

# Personal Knowledgebase SP

Help Manual



## Welcome

*Use KB articles stored on your Microsoft SharePoint lists to reply to support emails in Outlook seamlessly*

This is an elaborate help documentation that will guide you how to use Personal Knowledgebase for Outlook and SharePoint. For a quick overview, refer to our video demonstration available on the product website.





## Table of Contents

Welcome .....	1
1. Why do you need a knowledgebase? .....	3
2. Introduction .....	4
Purpose of this add-in .....	5
3. Requirements.....	6
4. My Settings.....	7
4.1 Choose and configure KB SharePoint lists.....	8
4.2 Problems List .....	14
4.3 Custom Fields .....	15
4.4 Reply Templates.....	16
4.5 Notification Template .....	17
4.6 Advanced Options .....	18
5. Generating new Empty KB Article .....	24
6. Generating new KB Article to SharePoint from an email.....	25
7. Inserting a KB Article to a new email when composing.....	27
8. Reply a KB Article to an existing email .....	29
9. Send a KB Article to an Outlook contact .....	33
10. Navigate to the Draft KB Folder .....	35
11. Open KB SharePoint lists in web browser .....	36
12. Uninstalling Personal Knowledgebase add-in .....	37
13. Important links .....	38

## 1. Why do you need a knowledgebase?



You frequently find yourself solving the same issue over and over. Your end-users send you emails on similar issues repeatedly. You wish you could share your knowledge with team members so that everyone has the same understanding and are communicating the same message when asked about specific issues! Yes, a knowledge management system is what you need, where all the best practices of your businesses, operations and assets are documented, and are accessible at the enterprise level to all members of your team.

Other factors that demand for a knowledge management system:

- ✓ Rising rate of innovation and increasing competition in marketplaces
- ✓ To replace informal knowledge with format methods, especially, when the organization is under-staffed
- ✓ Competitive pressures reduce the size of workers that holds valuable business knowledge.
- ✓ To help new workers to experience and acquire knowledge in the shortest time.
- ✓ Early retirements and increasing mobility of the work force lead to loss of knowledge.
- ✓ Need to manage increasing complexity as business operations become globalized.
- ✓ Changes in strategic direction may result in the loss of knowledge in a specific area.
- ✓ Retaining knowledge when employees leave or change positions

As most of our work is information based, it is imperative that organizations maintain a structured library of information and solutions, such that, the knowledge system provides access to right information, at the right time, to the right workers in need. In brief, knowledge and information have become the medium in which business problems occur. As a result, managing knowledge represents the primary opportunity for achieving substantial savings, significant improvements in human performance, and competitive advantage.

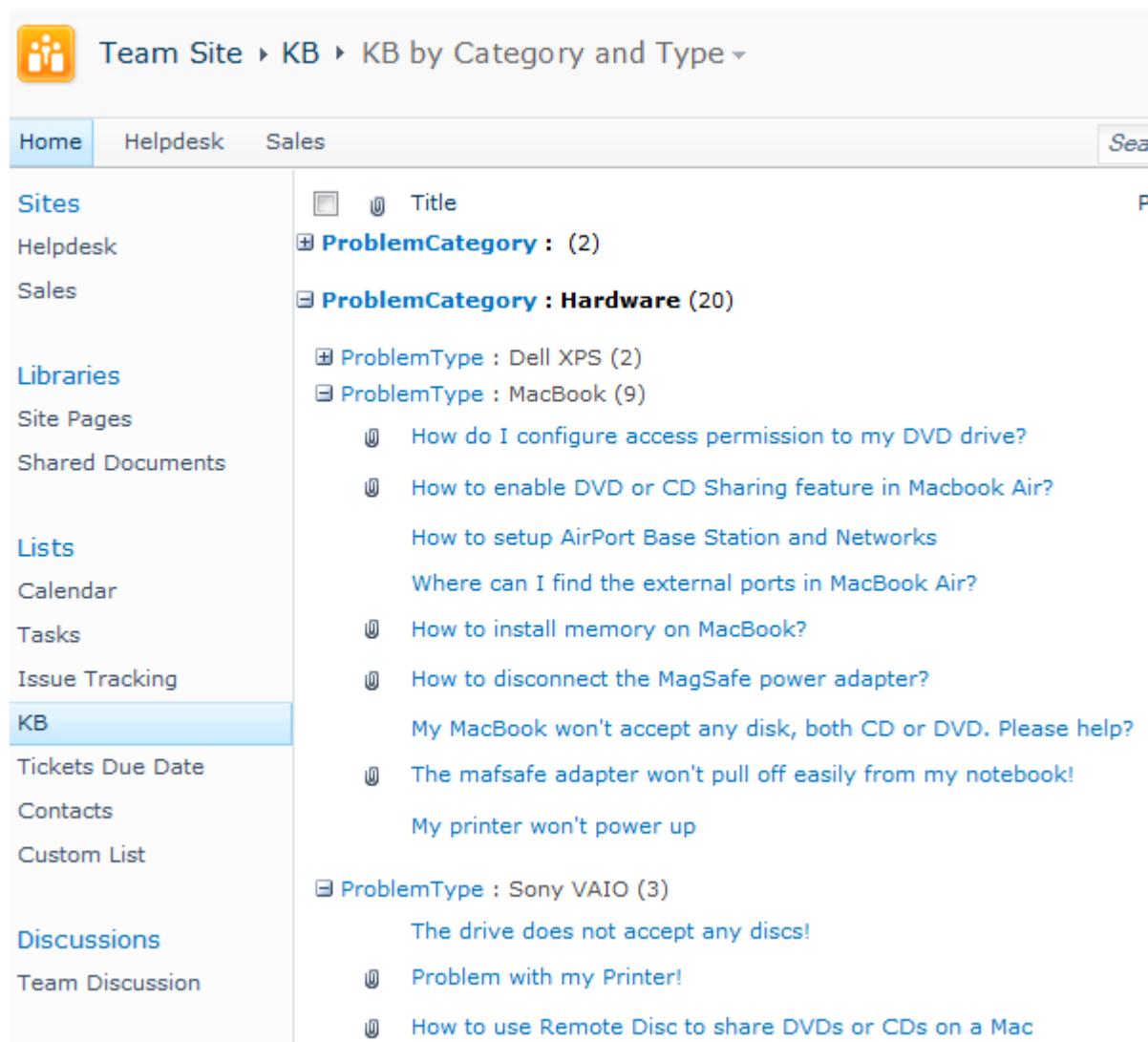




## 2. Introduction

Personal Knowledgebase for Outlook & SharePoint is installed as a COM Add-in for Microsoft Outlook 2010/2013/2016, and uses one or more SharePoint lists, for storing and sharing knowledge base articles throughout the organization. The Add-in makes it very easy to search and locate a knowledge base article relevant to a customer issue from within Outlook and insert it to the outgoing email reply as PDF file attachment or embed as inline content or as hyperlink URL. All these without requiring switching back and forth between Outlook and SharePoint.

Personal Knowledgebase can help to reduce customer support, improve staff productivity and eliminate time wasted searching for information across disparate systems such as shared folders and paper documents, all inside Outlook.



The screenshot shows the 'Team Site' navigation pane with the following structure:

- Team Site
  - KB
    - KB by Category and Type
      - Home
      - Helpdesk
      - Sales

The main content area displays a list of knowledge base articles categorized by 'ProblemCategory' and 'ProblemType'.

ProblemCategory	ProblemType	Article Title
Hardware (20)	Dell XPS (2)	How do I configure access permission to my DVD drive?
		How to enable DVD or CD Sharing feature in Macbook Air?
	MacBook (9)	How to setup AirPort Base Station and Networks
		Where can I find the external ports in MacBook Air?
		How to install memory on MacBook?
		How to disconnect the MagSafe power adapter?
		My MacBook won't accept any disk, both CD or DVD. Please help?
		The mafsafe adapter won't pull off easily from my notebook!
		My printer won't power up
		Sony VAIO (3)
Problem with my Printer!	How to use Remote Disc to share DVDs or CDs on a Mac	

As you use Microsoft Outlook, every day, all the time, to attend to emails from end-users, Outlook needs to do more than just acting as a simple email-client. Personal Knowledgebase add-in extends your Outlook to provide better interaction between you and your knowledge base, transforming it into an **information-based, interaction-driven** and **easy to use** collaboration tool.

With such functionalities in Outlook, you can document best practices and solutions to common problems and reply to time-consuming and repeated queries from your users in a click, thereby, **reducing service response** time, enabling **effective collaboration** and **overall productivity** for your team.



## Purpose of this add-in

You frequently find trying to solve the same issue over and over. Your end-users send you emails on similar issues repeatedly. And if you are already aware of the solution, typically, you will try to compose the solution or if you have vague recollection of it, you would try to navigate to your existing document libraries, past emails etc. Just consider how much time and effort you had wasted in trying to find the right information at the moment of need, not to mention the delayed response to the support request. You wish you could share your knowledge on a centralized information system with other team members so that everyone has the same understanding and are communicating the same message when asked about specific issues.

Many IT managers resort to using SharePoint lists to document best practices and solutions to common problems, in the form of KB articles, because of the easy accessibility and collaborative capability. So, when a support request email is received in Outlook, support staffs would generally go to the SharePoint lists and browse or search through the tier of KB articles. If a relevant article is found, either the staff would rewrite the solution from scratch into the email or copy the contents from SharePoint site to the email reply, in a crude fashion. In the midst of this, the formatting, inline images and other attachments of the particular KB article do not make it to the email. After putting much effort and time, you still didn't get the complete KB article inserted into the email reply. Moreover, the frequent switching back and forth between the email client and SharePoint site tends to loosen the focus of the support staff, leaving him/her frustrated. Evidently, organizations and teams that leverage SharePoint as knowledge base would need to reinvent the wheel and implement an efficient way of importing SharePoint based article or document, to outgoing email reply.

Personal Knowledgebase is designed to bridge this gap between your email client such as Outlook and your SharePoint lists where all your knowledge base articles are stored, such that you can effortlessly locate a KB article (stored on SharePoint) relevant to an issue from within Outlook itself and insert it into an outgoing email reply in a single click. All these and more making sure, the outgoing email retains all the actual files and the original formatting of the selected KB article. No more frequent switching between Outlook and SharePoint, no more copy-paste job etc.



### 3. Requirements

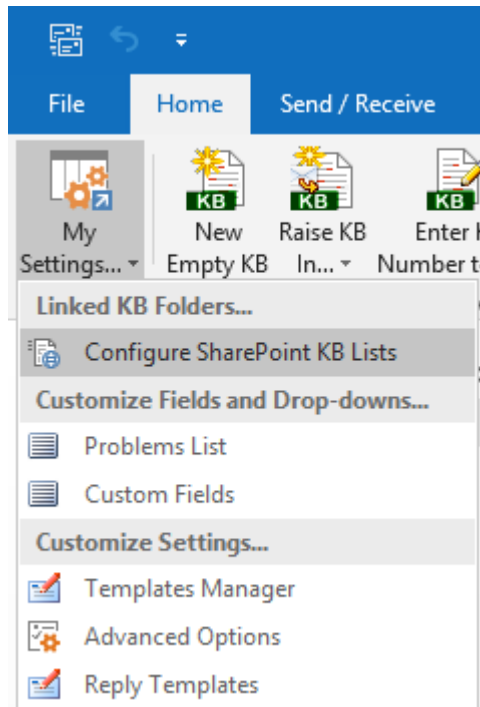
<b>Windows Version</b>	Windows 10, Windows 8, Windows 7, Windows Vista (32 bit or 64 bit) and all server-based Windows 2008 R2 and above. Windows XP is not supported.
<b>Outlook Version</b>	Microsoft Outlook 2007, 2010, 2013, 2016, 2019 (both 32-bit and 64-bit are supported). Earlier versions such as Outlook 2000, XP should work, but they are not actively supported. The application operates directly inside the Microsoft Outlook. Outlook Express is not supported.
<b>SharePoint</b>	SharePoint 2010 or Higher. Cloud-based SharePoint such as Office 365 are also supported.
<b>Others</b>	Microsoft .NET Framework 4.6



## 4. My Settings

The Personal Knowledgebase add-in provides a dedicated menu in the toolbar that allows you to customize the contents of all problem categories/types drop-down boxes, Choose and configure KB SharePoint lists etc.

The Personal KB menu serves as the gateway for launching most of the functionalities and tools available. In Outlook 2016, you would find this menu under in a dedicated button menu **'My Settings'** under the toolbar as shown below.



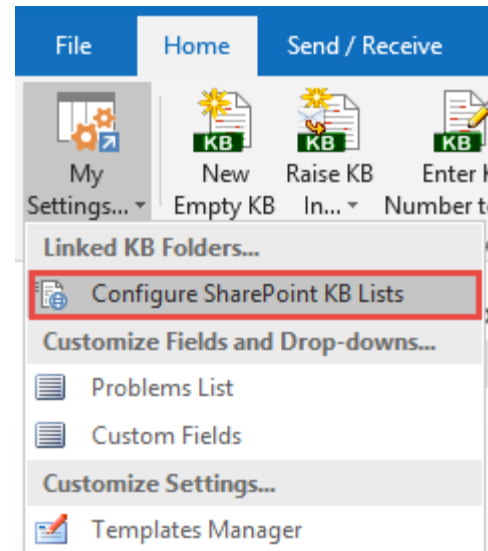


## 4.1 Choose and configure KB SharePoint lists

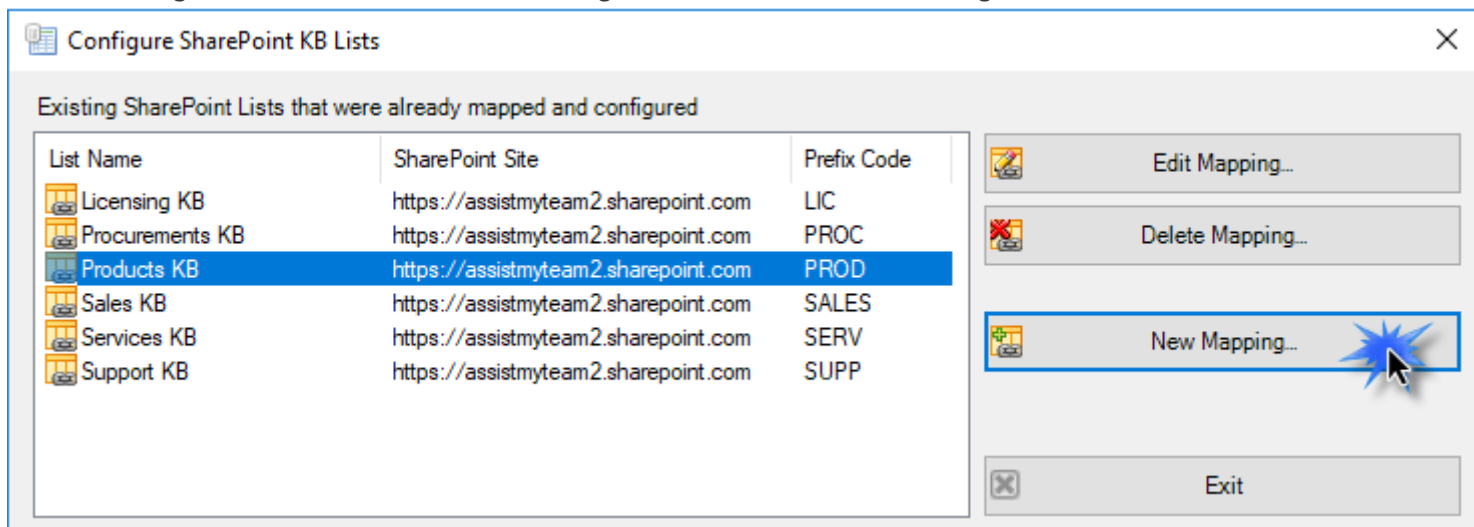
Before you can start generating KB articles or using them in Outlook, you need to choose the destination KB SharePoint lists that store the KB articles and link them up with Personal Knowledgebase Add-in.

Once linked, you would be able to use KB articles from these SharePoint lists to reply to emails, as well as generate new KB articles in one of these linked KB folders using information and content from emails in Outlook.

To choose and configure a new KB folder, go to **My Settings menu > 'Configure KB SharePoint lists.**

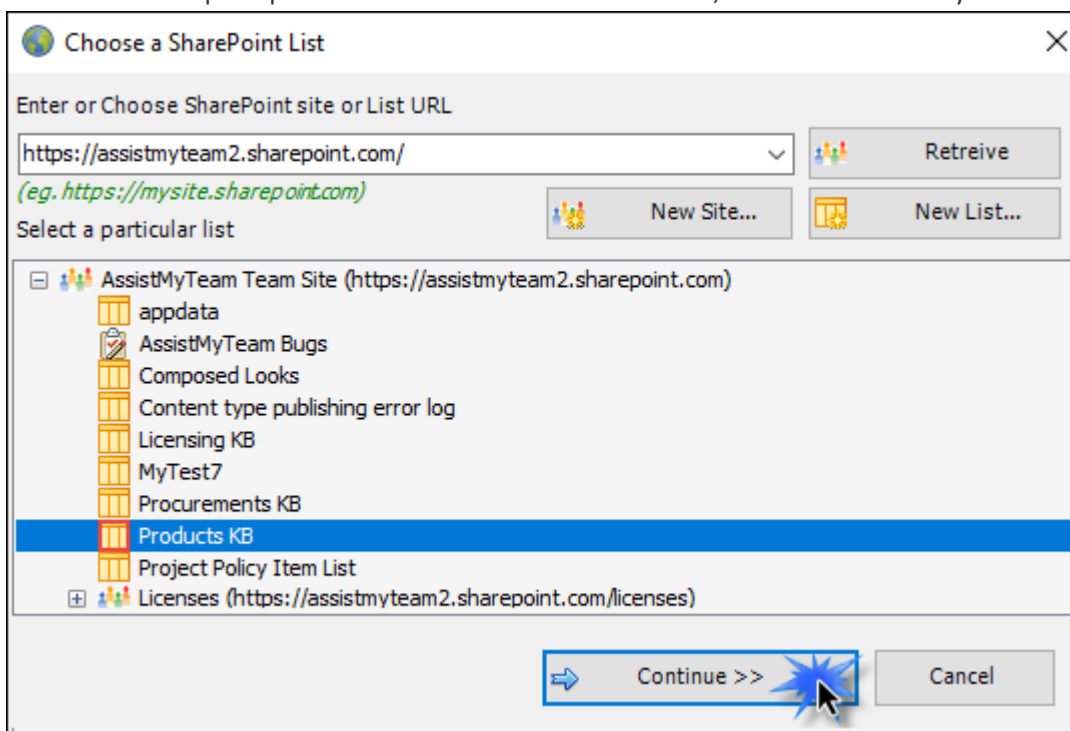


Here is a listing of all KB SharePoint lists containing KB articles that are linked using the add-in tool.

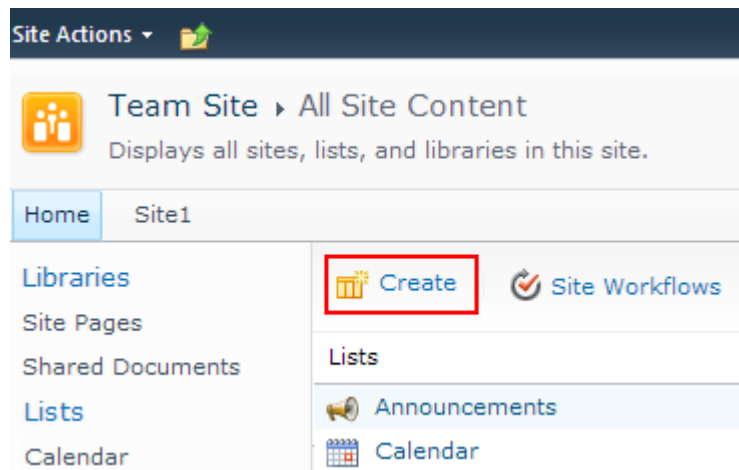


To choose and configure a new KB SharePoint list, click **'New Mapping...'** button.

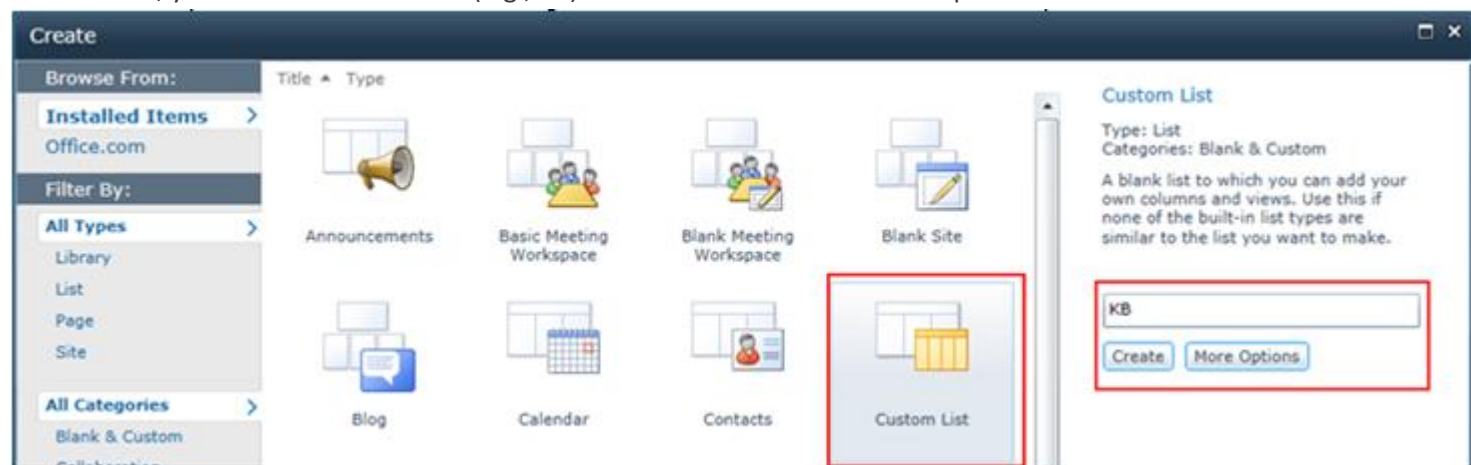
You will then be prompted to enter the SharePoint site URL, and it would allow you to choose a SharePoint list.



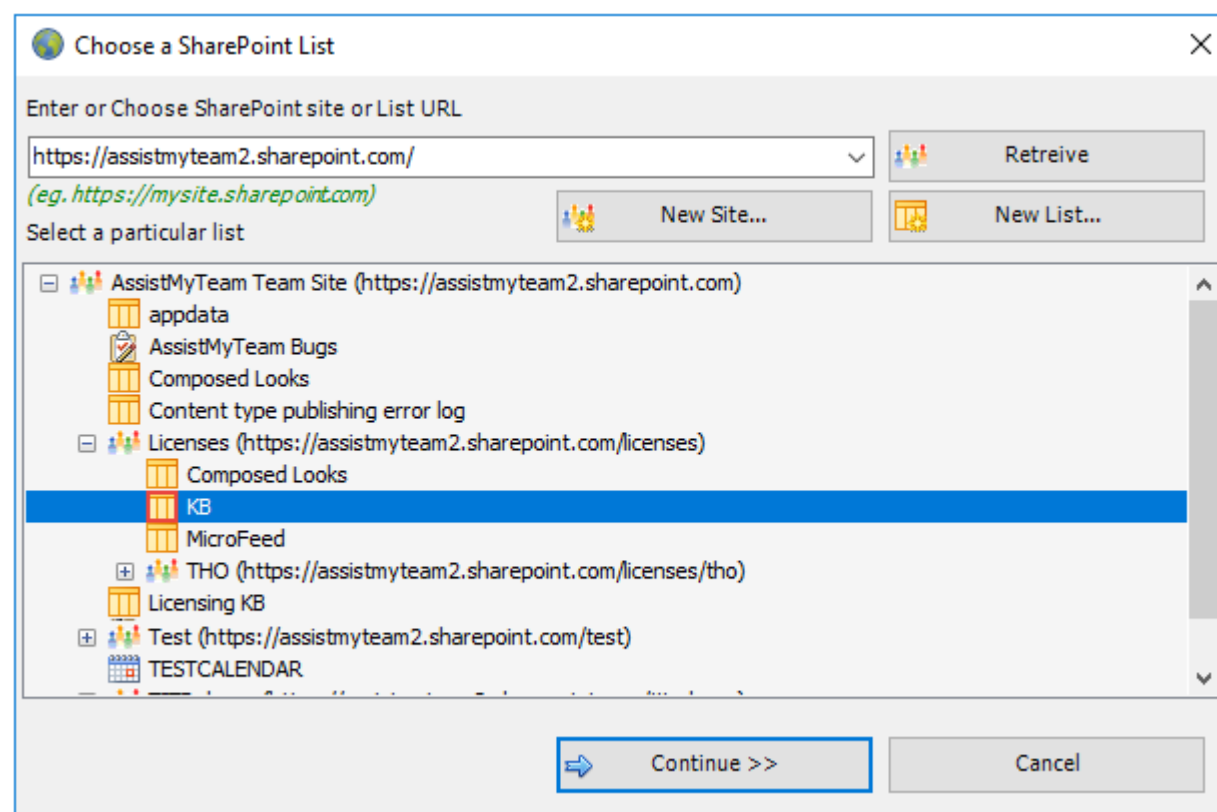
You can choose re-use existing SharePoint lists or create new one for this purpose. Ideally, we recommend that the SharePoint lists you will choose for used with Personal KB add-in were derived from the inbuilt 'Custom List' template in your SharePoint.



For instance, you can create a new list (e.g., KB) based on the 'Custom List' template below:



And then choose this newly created SharePoint list (e.g. KB) or any other existing lists from the mapping tool and click 'Confirm'.



Instead of creating the new site/list in the SharePoint using your web browser, you can also choose to create – new site or list directly from the add-in.

- 1 New Site** – Create a new site directly under the chosen parent site to be used exclusively for Personal KB add-in. By default, the site will be created as a blank site, unless a different site template is specified.

**Enter New Site Info**

**New Site...**

Title: Licenses \*

Template: Blank Site \*

URL Name: <https://assistmyteam2.sharepoint.com/> Licenses \*

Description: This site is used for Licenses KB and other resources

Language: English

☒ Use same permissions as parent site

\* Mandatory Fields

Create Cancel

- 2 New List** – You can choose to create a new list directly under the chosen site. By default, the list would be created using the 'Generic List' (custom list) template available in your SharePoint. However, you can change the template from the drop down.

**Enter Info for New List**

**New List...**

to be created under:  
<https://assistmyteam2.sharepoint.com/licenses/>

List Name: KB \*

Template: Generic List \*

Description: Stores KB articles on License Acquisition

\* Mandatory Fields

Create Cancel

After choosing a destination SharePoint list (either by creating a new one, or by selecting an existing list), you can proceed to start mapping the fields between Outlook and SharePoint.



Through the mapping tool, you can choose which fields from the emails in Outlook are to be extracted and published to the SharePoint KB list and perform the mapping between these chosen fields of the emails to that of the SharePoint KB list.

**Fields Mapping**

**SharePoint List**  
<https://assistmyteam2.sharepoint.com/Lists/Products KB>
Specify URL... Clear

**Unique Tracking Prefix Code**  
 PROD Please provide a unique code of 5 or less characters

**Map fields between Outlook mail to SharePoint list**

	Outlook Field	Data Type	SharePoint Field
1	Subject	Text	Title
2	Problem Category	Choice	ProblemCategory
3	Problem Type	Choice	ProblemType
4	Not Ready For Use	Yes/No	NotReadyForUse
5	States	Choice	States
6	BankDOB	Date/Time	
7	BankHQ	Yes/No	
8	BankID	Numeric	BankID
9	BankInfo	Note	
10	BankName	Text	
11	BankPrice	Currency	
12	Solution	Note	Solution

Save Cancel

A mapping is nothing but an association between an Outlook field (e.g., *subject of the mail item*) to a specific SharePoint list field (e.g., *Title*). You have complete control over which data goes to the SharePoint list from Outlook. In the mapping dialog box (above), the first column lists all the email fields as available in Outlook. The second column displays the data type of the field. In the last column, there is a drop-down list on each row, consisting of all available SharePoint fields. Just simply choose a SharePoint field from the drop-down box to map it to the corresponding Outlook field. For example, in the screenshot above, Outlook field 'Problem Category' is mapped to SharePoint field 'ProblemCategory'.

You can choose to auto create the required fields in the SharePoint list as well as auto-map the fields between the Outlook and SharePoint.

**1 For mandatory unmapped fields** - Click this option under the 'Auto Create & Map fields' menu to create the mandatory KB fields in the chosen SharePoint list on the fly and automatically complete the mapping. Mandatory fields are marked/colored in light red. The following fields are mandatory to complete the mapping - *Subject, Solution, Problem Category, Problem Type, Not Ready For Use*.

**2 For all unmapped fields** - Click this option under the 'Auto Create & Map fields' menu to create all the KB fields that have not been mapped yet in the chosen SharePoint list and complete the mapping automatically. If the chosen SharePoint list have any matching existing fields, instead of creating new ones, the add-in will try to use them to map with the KB fields. For instance, if the chosen SharePoint list was created based on the 'Custom List', the list already contains predefined fields such as *Title, Description* etc.

**3 For the following fields** - Click this option under the 'Auto-Create & Map fields' menu to choose specific KB fields of interest that will be auto-created in the chosen SharePoint and mapped automatically.



Choose Outlook Fields...

Choose KB fields for which corresponding new SharePoint fields would be created

- ☐ Subject
- ☐ Problem Category
- ☐ Problem Type
- ☐ Not Ready For Use
- ☐ States
- ☐ BankDOB
- ☐ BankHQ
- ☐ BankID
- ☐ BankInfo
- ☐ BankName
- ☐ BankPrice
- ☐ Solution

Confirm

Cancel

Optionally, to have finer control, you can also manually create new fields in the chosen destination SharePoint list and map with the KB outlook fields.

#### Create New SharePoint Field - on the fly

In the drop-down list of the SharePoint field, you will also notice that there is an item '[NEW LIST FIELD]'. You can select this item to create a new field in the particular SharePoint list, directly from this mapping tool, so that you can map the specific Outlook field to this new SharePoint field, without requiring you to create it in your SharePoint site.

	Outlook Field	Data Type	SharePoint Field
1	Subject	Text	
2	Problem Category	Choice	
3	Problem Type	Choice	
4	Not Ready For Use	Yes/No	[NEW LIST FIELD]
5	States	Choice	
6	BankDOB	Date/Time	
7	BankHQ	Yes/No	
8	BankID	Numeric	
9	BankInfo	Note	
10	BankName	Text	
11	BankPrice	Currency	
12	Solution	Note	

Specify a field name that you would like to appear in the SharePoint list. Only input valid characters and avoid using special characters such as symbols.

Field Name

Specify a unique name for the new field!

OK

Cancel

Category

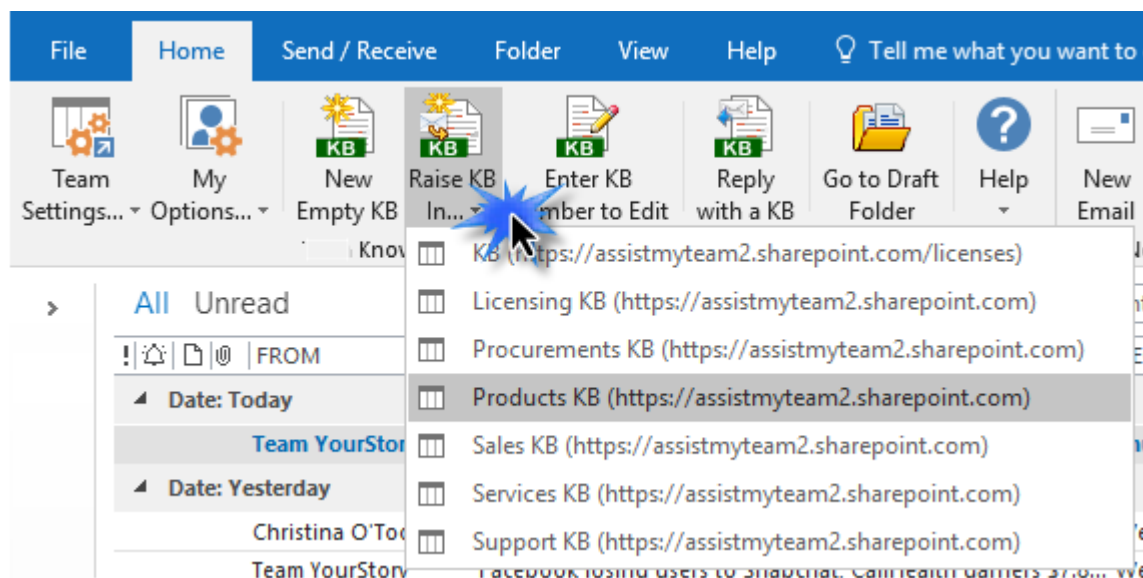


The new SharePoint field will have the same data type as that of the corresponding Outlook field.

	Outlook Field	Data Type	SharePoint Field
1	Subject	Text	Title
2	Problem Category	Choice	Category
3	Problem Type	Choice	ProblemType
4	Not Ready For Use	Yes/No	NotReadyForUse
5	States	Choice	States
6	BankDOB	Date/Time	BankDOB
7	BankHQ	Yes/No	BankHQ
8	BankID	Numeric	BankID
9	BankInfo	Note	BankInfo
10	BankName	Text	BankName
11	BankPrice	Currency	BankPrice
12	Solution	Note	Solution

**NOTE:** Those fields with light green background color are custom fields which you can define in **Outlook > My Settings > Custom Fields** panel so that you can have additional fields to best describe and add metadata on the KB article.

If you have added multiple SharePoint KB lists in Personal KB add-in, you will notice that the '**Raise KB in**' drop down menu shows all of them. You and other users can then simply choose the destination SharePoint list to which a new KB will be raised from the selected email in Outlook.



You can define, map and link any number of SharePoint lists from multiple sites so that, you can have a choice to choose a particular SharePoint list of interest to which new KB from their emails can be raised from their Outlook, or more importantly, choose an existing KB article from one of the relevant SharePoint list to reply to an email in Outlook.



## 4.2 Problems List

The Problems list panel allows you to add categories and sub-categories (e.g., types) that are representative of all possible incidents reported by your end users.

Problem Categories		Problem Types	
Category	Problem Types	Problem Categories	
1. Cars	1. Audi	Cars	▼
2. Countries	2. BMW	Cars	▼
3. Hardware	3. CPU	Hardware	▼
4. Services	4. Intel	Hardware	▼
5. Software	5. Keyboard	Hardware	▼
6. (empty)	6. Mac	Software	▼
7. (empty)	7. Mercedes	Cars	▼
8. (empty)	8. Mouse	Hardware	▼
9. (empty)	9. Office 2016	Software	▼
10. (empty)	10. Outlook	Software	▼
11. (empty)	11. SharePoint	Software	▼
12. (empty)	12. UAE	Countries	▼
13. (empty)	13. UK	Countries	▼
14. (empty)	14. USA	Countries	▼

1. Gather all the problem areas that you will be attending to and feed them into the 'Category' field.

2. **Problem types list** - The problem types are sub-category items that falls within the domain of a problem area/category. Hence, each problem category has a specific list of problem types that you can choose from when submitting a new KB article.

**NOTE:** If a particular problem type is applicable to all problem categories, leave the 'Problem category' column as empty. That is, if you have a common problem type for all Problem categories, you don't need to add the same problem type for each category. Just leave the Problem Category column empty for that problem type.

In the knowledge base form, when you select a problem category from the drop-down field, it will load this tier of problem type lists in the type drop-down box, corresponding to the selected category. These nested tiers of categories/types are complete customizable to your organization's support model and act as somewhat of a guiding decision tree for users (internal staffs as well as web users) in finding the right KB article.

KB Folder: \\Public Folders\\All Public Folders\\Hardware Troubleshootings

**KB Article #100010**

ID: 100010  
Created: 3/4/2018 1:31:03 PM  
Modified: 3/4/2018 8:01:35 PM  
Author: Bahrur Rahman  
Last Modified By: Bahrur Rahman

Category: Hardware  
Type: Ipad

☐ Not Ready For Use

Buttons: Edit Solution, New ID, Update KB, Delete KB, Exit

From: Assist, Posted To: Hardware Troubleshootings, Conversation: iPod Charging Issue, Subject: iPod Charging Issue

Terms of Support.pdf (142 KB)

**Make sure the Hold switch is off**

1. Check to see if the Hold switch is located on the top or the bottom

## 4.3 Custom Fields

You can use Custom fields and Custom list as KB metadata to help describe the KB article more meaningfully. Custom fields can be of 6 different data types as displayed in the image above: *Currency, Date/Time, Numeric, Text, Yes/No, Note*.

Custom Field	Data Type
1 Client	Text
2 ContactSource	Text
3 InternalId	Numeric
4	Currency
5	Date/Time
6	Numeric
7	Text
8	Yes/No
	Note

You can add any number of Custom fields as required and they will all appear in the KB form in Outlook.

**KB Article #100010**

ID: 100010  
 Created: 3/4/2018 1:31:03 PM  
 Modified: 3/4/2018 8:01:35 PM  
 Author: Bahrur Rahman  
 Last Modified By: Bahrur Rahman  
 Category: Hardware  
 Type: Ipad  
☐ Not Ready For Use

Client: Microsoft  
 ContactSource: Lenin Nevosky  
 InternalId: 453.00  
 States: HP

Buttons: Edit Solution, New ID, Update KB, Delete KB, Exit

**Custom List** - The titles of these custom list can be edited to get the proper meaningful label that signifies the information the field store. For example, the first drop down field can be titled as 'States' and the administrator can fill up the names of all the States.

**Custom Fields - Custom Lists**

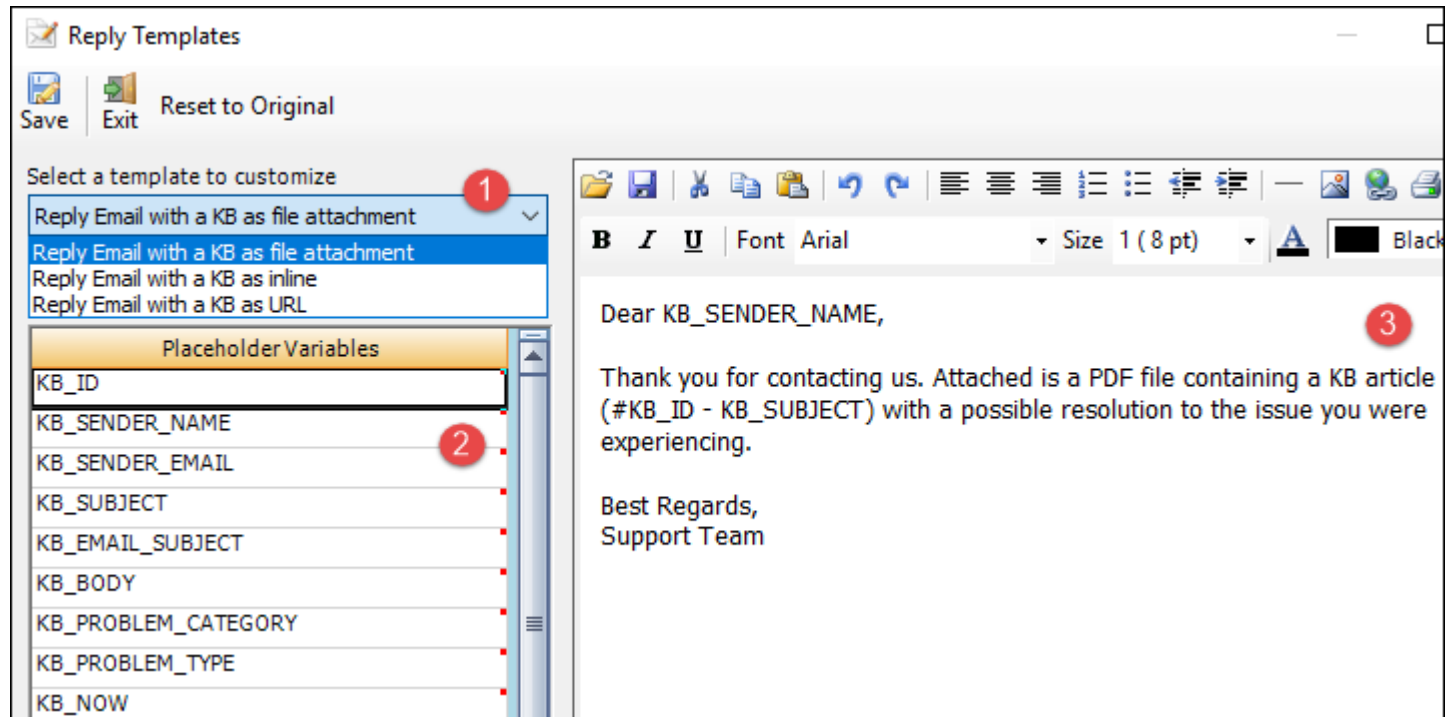
Select a Custom List: States

Buttons: New List..., Rename List, Delete Custom List

States
1 AP
2 HP
3 UP
4 MS
5 LP
6

## 4.4 Reply Templates

When you choose a KB article to insert into an email reply, usually, you would need to compose the initial portion of the reply, informing about this KB article and how it can help resolve the issue the sender was facing.



1 There are three templates provided that can be used when replying an email with a chosen KB article. With a template, you need not compose anything, even a single word, to make a personalized reply to the sender with a chosen KB article.

3 reply Templates:

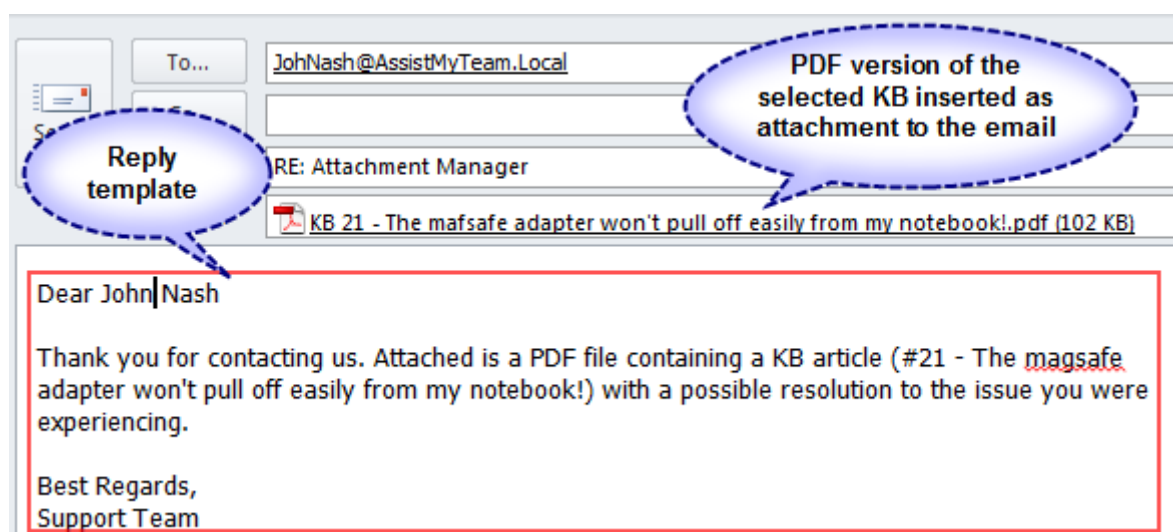
a) **Reply Email with a KB as file attachment** - This template is used when you choose a KB article to be inserted as PDF or MSG, XPS or DOC file.

b) **Reply Email with a KB as inline** - This template is used when you choose a KB article to be inserted as inline content directly into the body of the email reply.

c) **Reply Email with a KB as URL** - This template is used when you choose a KB article to be inserted as web URL into the body of the email reply.

2 List of all **placeholder variables** on the chosen KB article that you can embed into the template. The add-in will substitute the embedded placeholder variables with the actual data on the KB before sending the email.

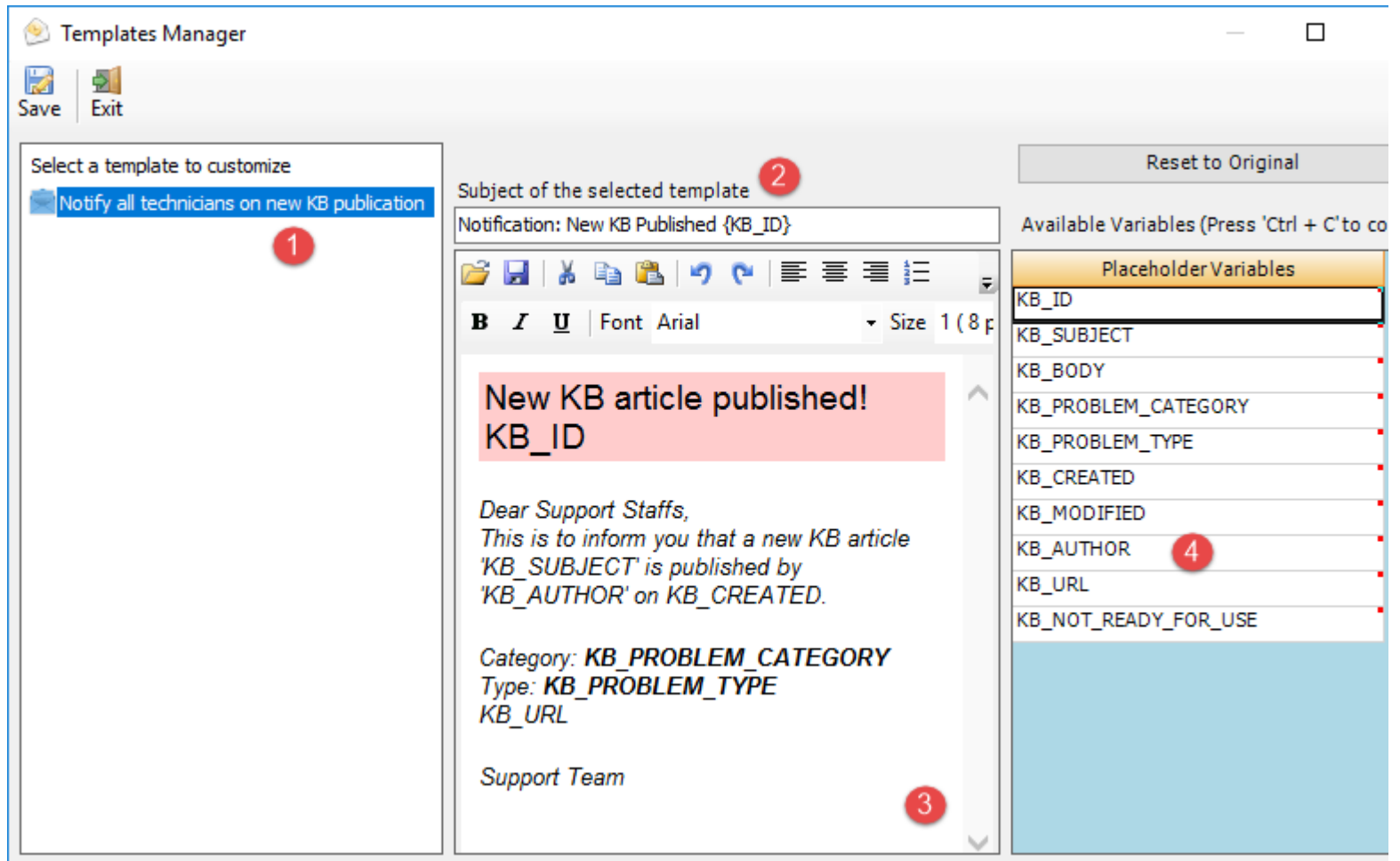
3 When you make the reply, the reply template is inserted into the outgoing email, substituting all the placeholder variables that you have inserted into the templates such as KB\_SENDER\_NAME, KB\_ID etc.





## 4.5 Notification Template

You can customize the email template that will be used in notifying support staffs and stakeholders when a new KB article is published.



- 1 This is the template name. And the corresponding body is customizable in the WYSIWYG editor.
- 2 **Subject** of the active template. This can be customized and can take placeholder variables.
- 3 A **WYSIWYG** HTML editor with which you can customize the contents, apply HTML formatting as well as insert the placeholder variables. The look and feel as well as the buttons and functionalities are similar to Microsoft FrontPage authoring tool
- 4 A list of all **placeholder variables** available for inserting into a particular template. In runtime (that is, when the actual email is generated from the template), the enclosed variables will be substituted by their corresponding values. The followings list all the supported variables:

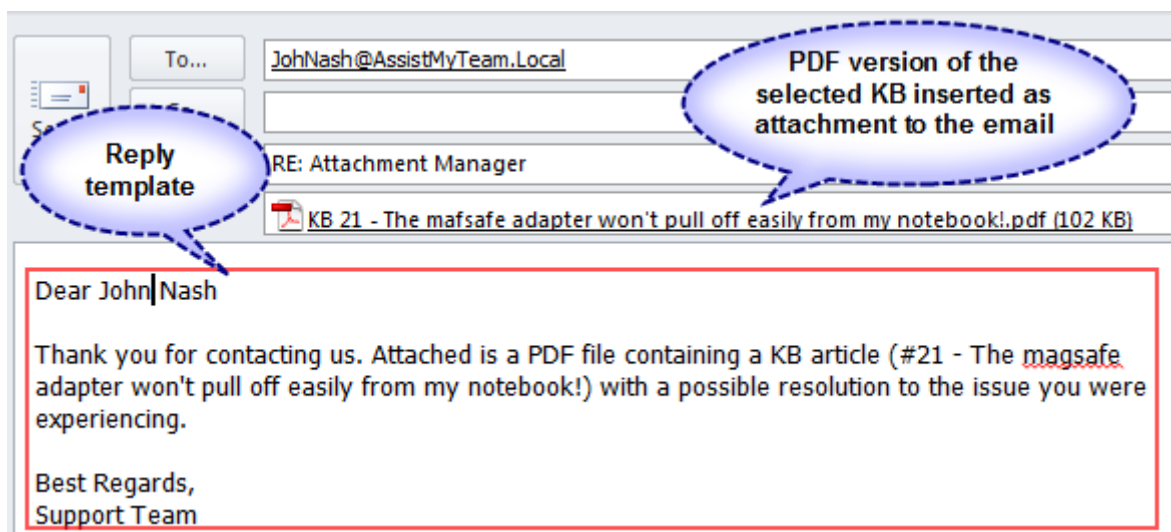
Variable	Purpose
KB_ID	Unique ID that is automatically generated when a KB article is generated.
KB_SUBJECT	The short description of the Article (Subject)
KB_BODY	The actual description/solution of the KB article (body field)
KB_PROBLEM_CATEGORY	Problem Category that is tagged to the KB article
KB_PROBLEM_TYPE	Problem Type that is tagged to the KB article
KB_CREATED	Creation time of the KB Article
KB_AUTHOR	The user who created this KB article
KB_NOT_READY_FOR_USE	The state of the KB article – Draft state or Published state.



## 4.6 Advanced Options

With the advanced options, you can control and streamline how you interact with Personal Knowledgebase Add-in and use KB articles from the chosen KB folders in their Outlook.

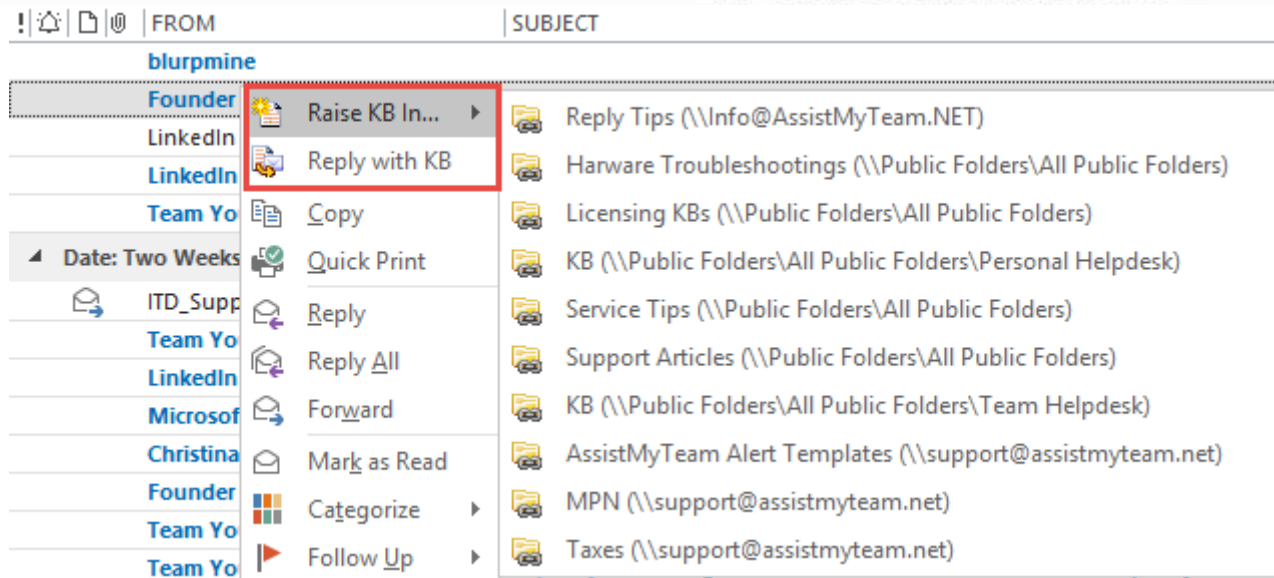
- 1 **Hide pop-up confirmation message** – Enable this option to hide the confirmation message that is displayed in a pop-up dialog whenever a new KB article is generated or edited or an email send.
- 2 **Use reply Template when using KB to reply to an email** – Enable this option to set the add-in to use a customizable email template when a KB article is chosen for replying to an email. These templates can be accessed and customized from *Outlook > Personal Knowledgebase toolbar > My Settings > Reply Templates*.



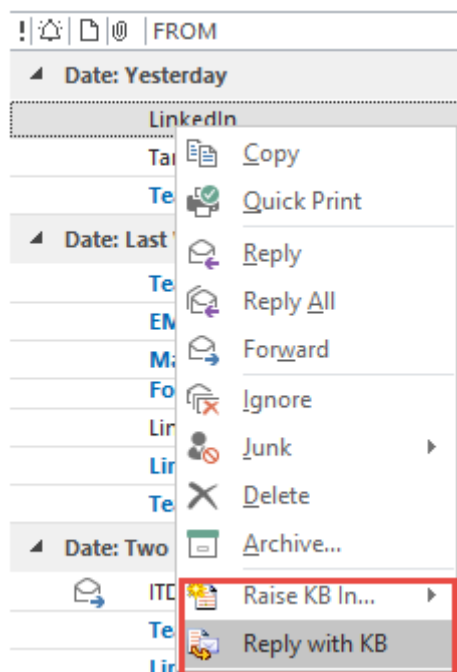
**NOTE:** If this is disabled, the add-in will only insert the chosen KB article as inline content or attachments and you will have to write your own reply.

- 3 **Show KB Context menu on top** – Enable this option to set your preference for the placement of the KB context menu in topmost or bottom position.

For instance, when this option is enabled, the KB menu items appear at higher position in the context menu (right-click menu)





If the option is unchecked, the KB menu items appear at the lowest position in the context menu.



- 4 When replying to an email, use 'Reply All' – Enable this option to configure the add-in to send the reply with the inserted KB article to all recipients of the original email (similar to the 'Reply All' button in Outlook toolbar)
- 5 Default category for newly generated KB article – Choose a category from the drop-down list that you would want to set as the default category to any newly generated KB article in Outlook.
- 6 Default Type for newly generated KB article – Choose a type from the drop-down list that you would want to set as the default type to any newly generated KB article in Outlook.
- 7 Enable this option to pre-fill information on multiple new KB articles that are generated from emails. Here you can set the number of KB articles that will be displayed in its respective KB form in Outlook before they are generated in the chosen KB folder. For instance, if you set value 3, when you choose 3 emails to generate KB articles, all 3 will be displayed in their respective KB form in Outlook so that you can pre-fill further information to the KB articles before they are generated in chosen folder. However, if you choose 5 emails, it will allow you to pre-fill on the first 3 emails (i.e., 3 KB forms will show up in Outlook), and the rest (2 KB articles) will be directly/instantly generated in the chosen folder.



My Settings...

General Article ID  Logo  Notifications UI

☒ Place KB Article ID in KB Subject 8

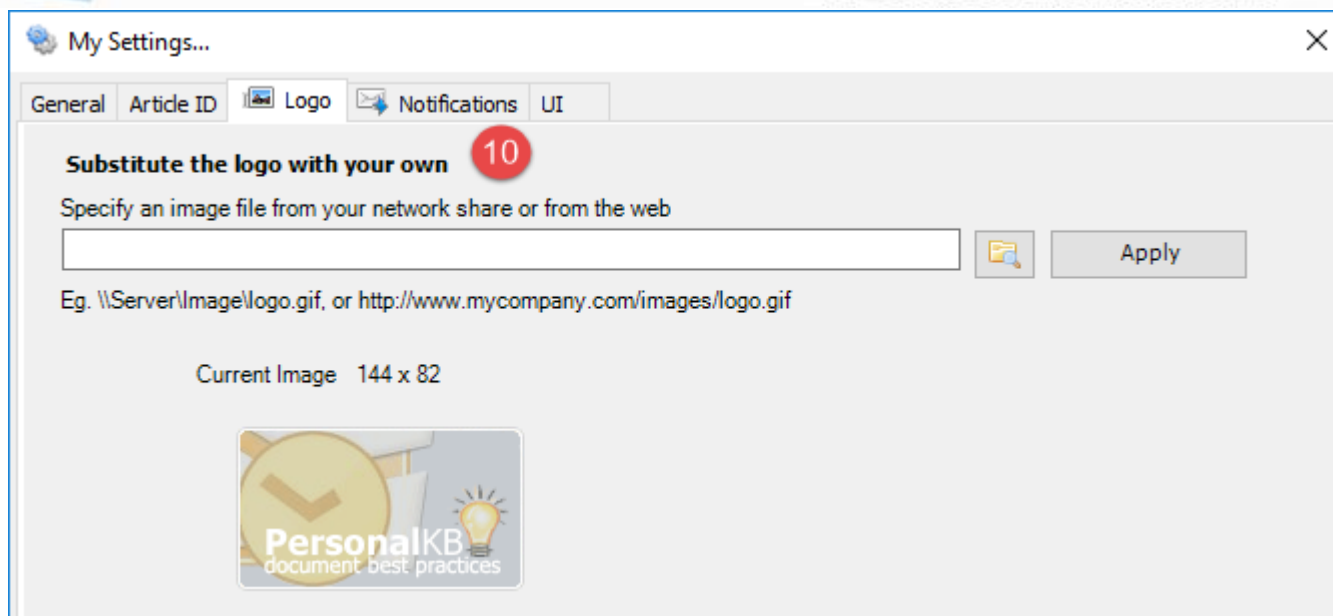
Placement of ID in Subject

☒ Beginning

☐ End

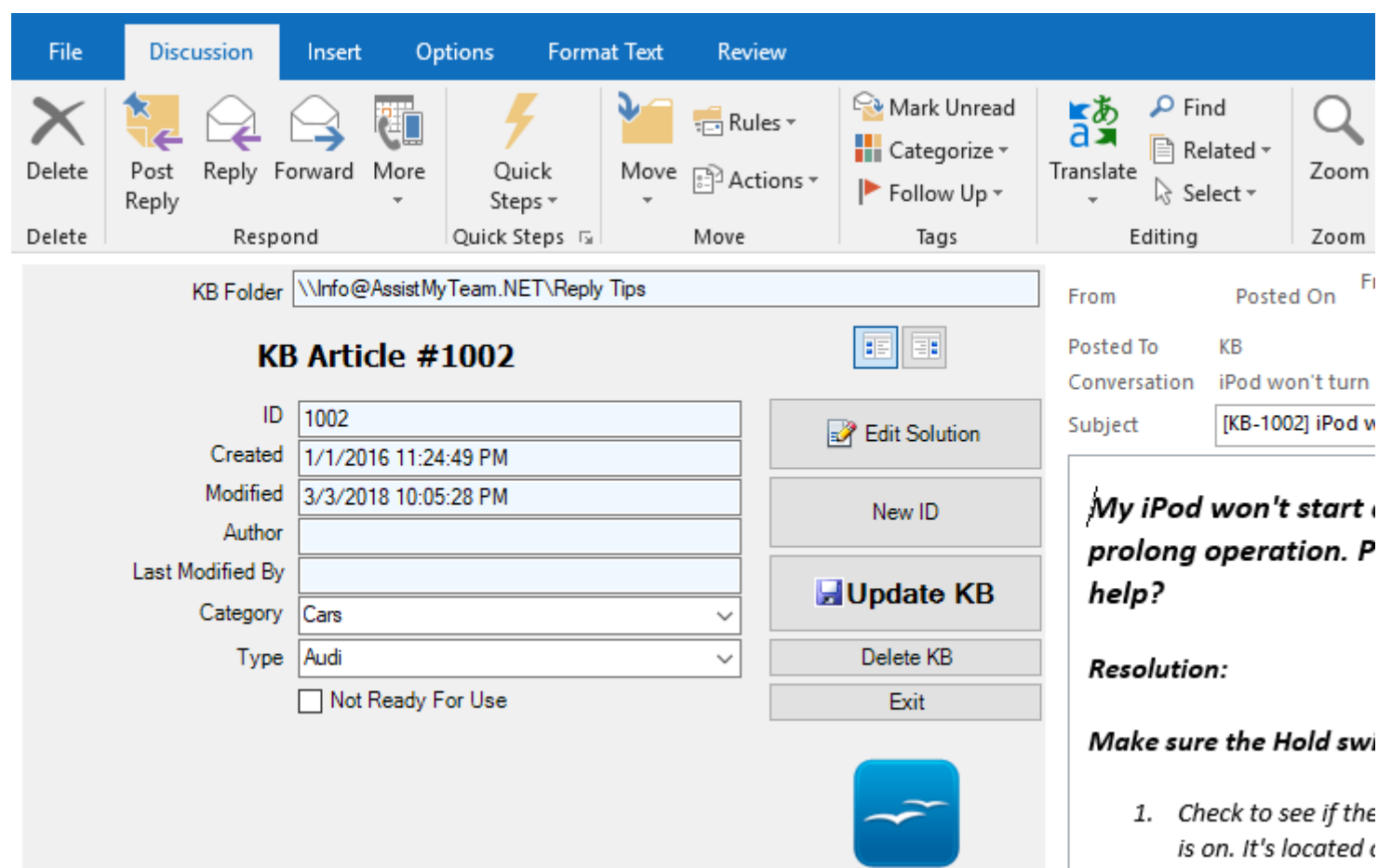
8

**Place KB Article ID in KB Subject** – Enable this option if the Article ID (enclosed in square brackets) is to be placed at the beginning or end of the subject line of the article item. By default, the ID is placed the beginning of the subject.

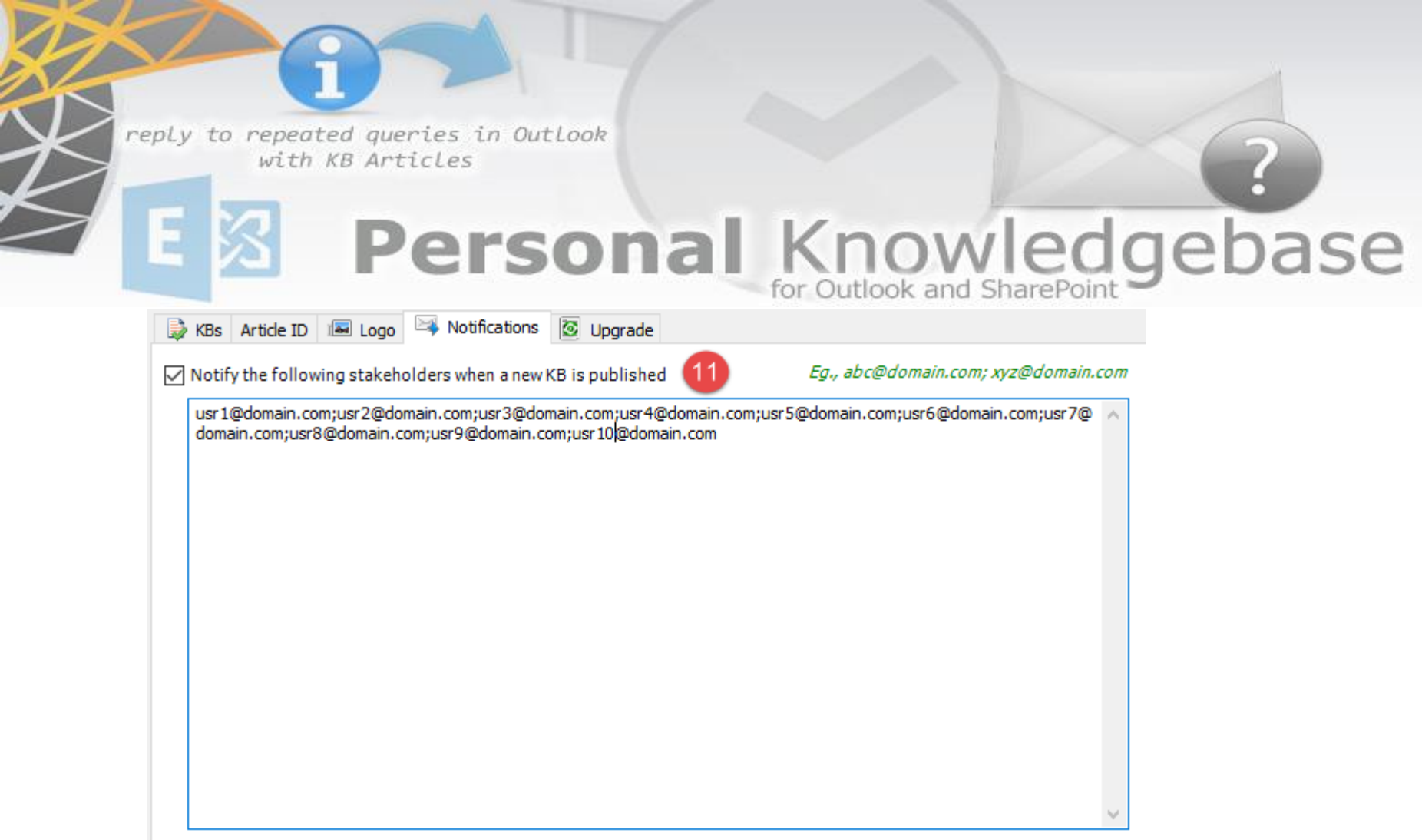


- 10 **Substitute the logo with your own**
- To use your own company logo or brand in the KB form, you can specify an image file (JPG, GIF, PNG) located on a network shared folder. Or, alternatively, you can use an image file located on the web.

And when you open and view any KB article in Outlook, your company logo you specified above will show in the KB form.



**NOTE:** Make sure you use an image path that is accessible to all users from their systems. This means, you can either make sure of an image file that is located on a shared network folder (e.g., \\Server\files\logo.gif) or an image from the web (e.g., www.company.com/logo.gif)



- 11 Notify the following stakeholders when a new KB is published – Enable this option to inform certain stakeholders (specified in the box) whenever a new KB article is published/generated in any of the administrator chosen KB folders.

**NOTE:** Make sure the stakeholders specified in the box are valid email addresses, each separated by a semi-colon (;)





General Article ID Logo Notifications UI

Ribbon placement for Personal KB toolbars in Outlook **12**

**In Explorer Window**

☒ First Placement ☐ Last Placement

☐ Use a dedicated tab on Explorer window

**In Inspector Window**

☒ First Placement ☐ Last Placement

☐ Use a dedicated tab on Inspector window

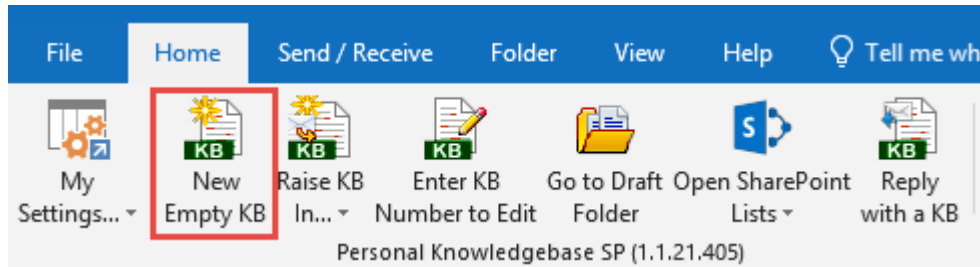
*Please note that changes in these ribbon settings would be applied only after Outlook restart*

12

Placement of toolbars in Outlook- With these options, you can control the placement of the KB toolbars in Outlook explorer and inspector windows. You can also choose to place the KB toolbar to a dedicated tab.

## 5. Generating new Empty KB Article

To generate a new empty KB article, click the 'New Empty KB' menu in the KB toolbar in Outlook.



A new Outlook item (with the message class 'IPM.Post.PKS.Article') will be generated in the folder, contents of which will be displayed in a special KB form. Enter the subject of the KB article (that best describe the problem or solution in a single line). And compose your KB solution in the body field of the item (such as you would compose any normal email in your Outlook).

The screenshot shows the 'New KB' form in Outlook. The form is titled 'New KB' and is part of a 'Discussion' window. It includes a 'SharePoint Site/List' dropdown set to 'Support KB (https://assistmyteam2.sharepoint.com)'. The form has several fields: 'ID', 'Created', 'Modified', 'Author' (Bahrur Rahman), 'Last Modified By' (Bahrur Rahman), 'Category' (Software), 'Type' (Office 2016), and 'Client'. There are also buttons for 'Edit Solution', 'Save As Draft', 'Publish KB', and 'Delete KB'. A checkbox labeled 'Not Ready For Use' is present. Callouts explain the following:

- Choose the SharePoint list to store the KB article**: Points to the 'SharePoint Site/List' dropdown.
- Enter the KB article subject**: Points to the 'Subject' field.
- Choose a Category that fits this article**: Points to the 'Category' dropdown.
- Feed data to additional custom fields that your administrator might have deployed**: Points to the 'Client' field.
- Compose your KB article here and make use of Outlook's inbuilt formatting features, insert images and attachments etc.**: Points to the main text area.

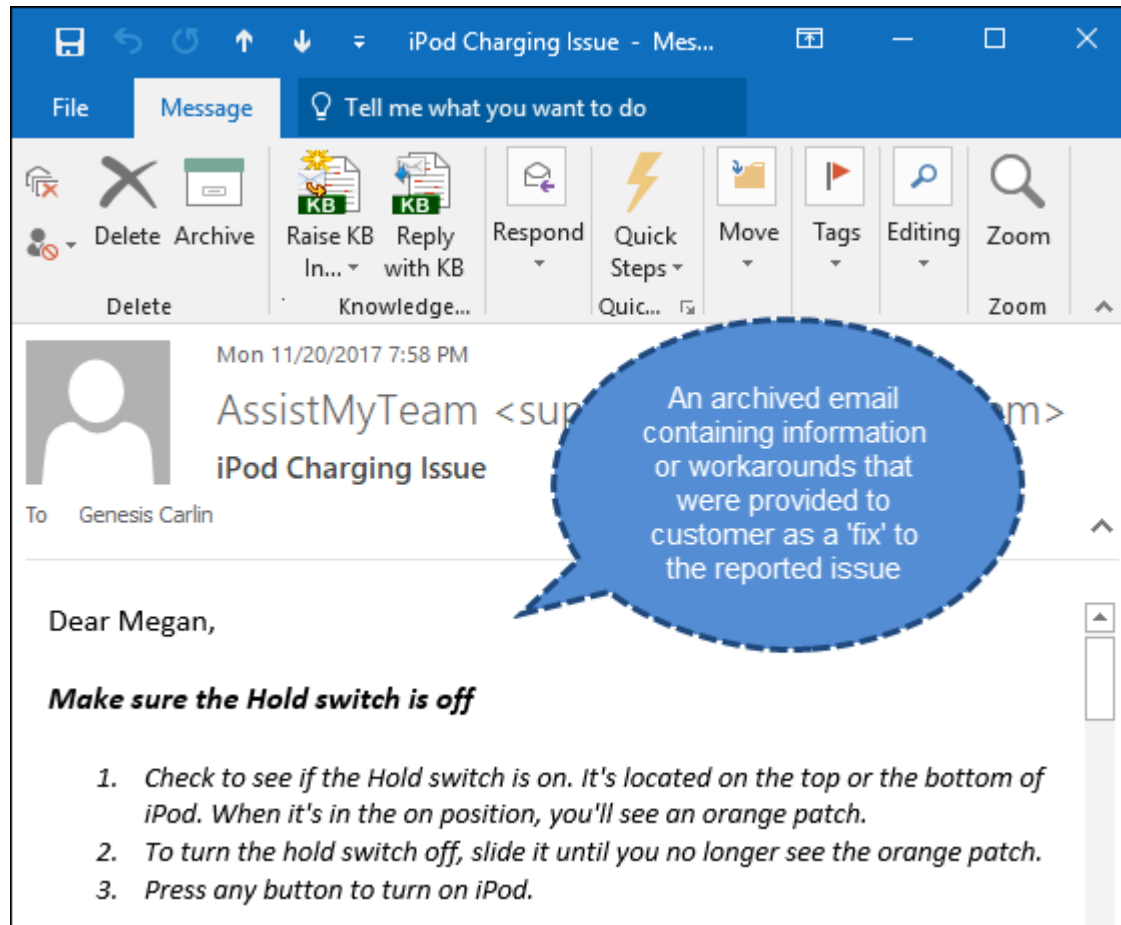
You can use feature rich formatting inbuilt tools of Outlook, embed images and attachments (just as you use to do while composing new emails). And don't forget to tag a category and type by choosing it from the drop-down fields within which this KB article falls within.

If the article is still in draft state i.e., not yet ready for use, check the 'Not Ready for Use' option so that it is not shown in the KB Selection box when you try to choose a KB article for replying to an email or contact in Outlook.

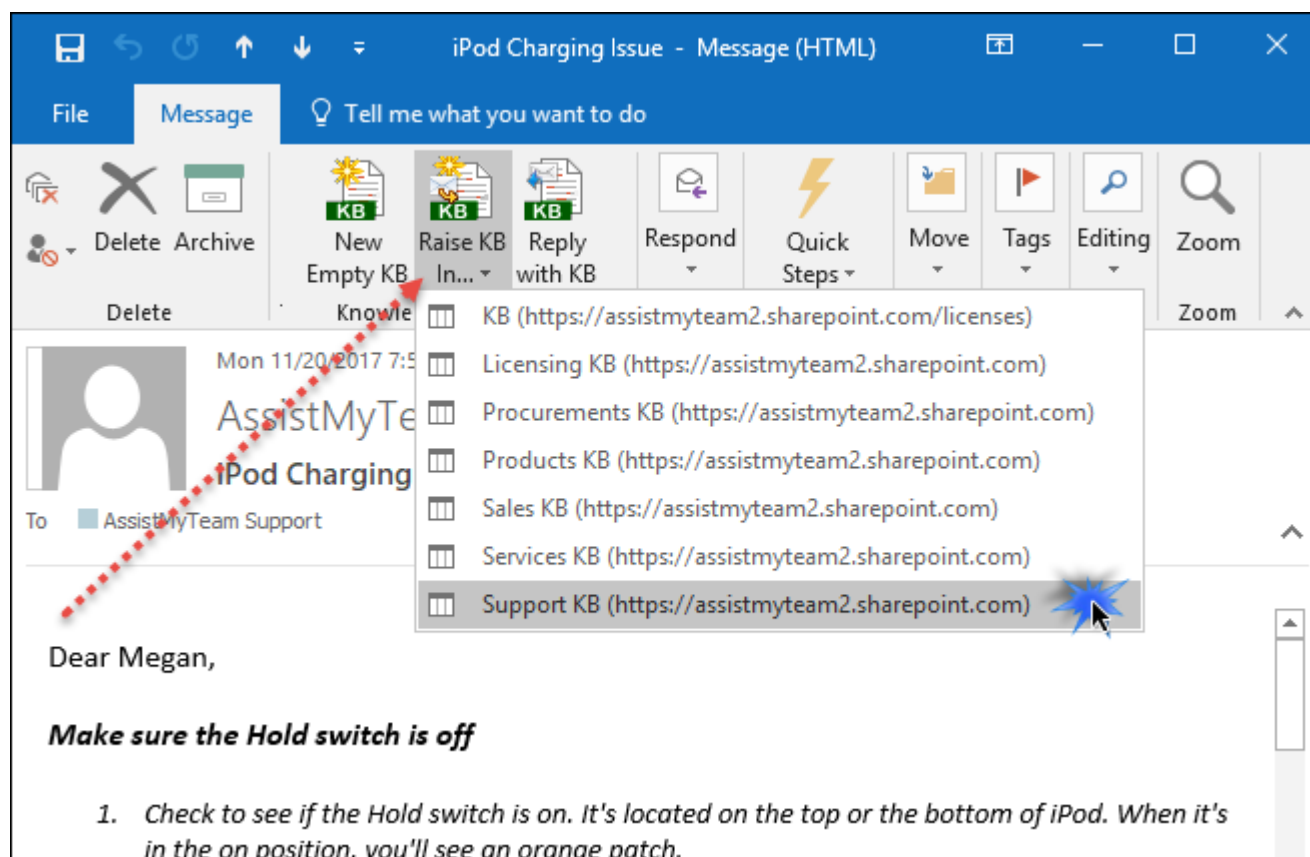
Once the KB article is ready for publication to the chosen SharePoint list, click 'Publish KB'. And a new KB article item will be generated in SharePoint, along with the formatting, contents, embedded images and attachments. If the KB article is still a work in progress, you can save it as draft in Outlook by click 'Save As Draft' button. What this will do is store this KB item in the draft folder of your primary mailbox for later use. Any time, you can navigate to that draft folder and open this KB article to finish it before publishing to SharePoint.

## 6. Generating new KB Article to SharePoint from an email

Most often, you might have already written solutions and workarounds to certain issues from your customers through email communications.



Such emails in your archive could potentially be a goldmine of knowledge of your organization. But mining such information at the time of needs can be tedious tasks for workers. They might have vague recollection of it. Another problem is navigating to such existing document libraries and past emails and searching for the right information at the moment of need often takes time and effort, not to mention the delayed response to the support request.





Instead, with Personal Knowledgebase Add-in, you can raise new KB articles from such emails, assign a unique ID, catalogue and tag it with metadata such as category, type and other information specific to your business and store it to one of your SharePoint list where it is available for use by your knowledge workers.

The screenshot shows the Outlook ribbon with the 'Discussion' tab selected. The 'SharePoint Site/List' dropdown is set to 'Support KB (https://assistmyteam2.sharepoint.com)'. The 'KB Article #8' form is visible, with fields for ID (8), Created (3/6/2018 6:18:00), Modified (3/6/2018 6:18:00), Author (Bahrur Rahman), Last Modified By (Bahrur Rahman), Category (Hardware), and Type (iPod). A callout bubble points to the ID field, stating: 'A new unique ID assigned to this article for quicker reference in future'. Another callout bubble points to the 'Move' button, stating: 'SharePoint list in which this KB article is stored'. A third callout bubble points to the 'Update KB' button, stating: 'Description on the fix, images and attachments are automatically transferred from the archived email'. The 'Subject' field contains 'iPod Charging Issue'. The 'Make sure the Hold switch is off' instruction is visible in the right pane.

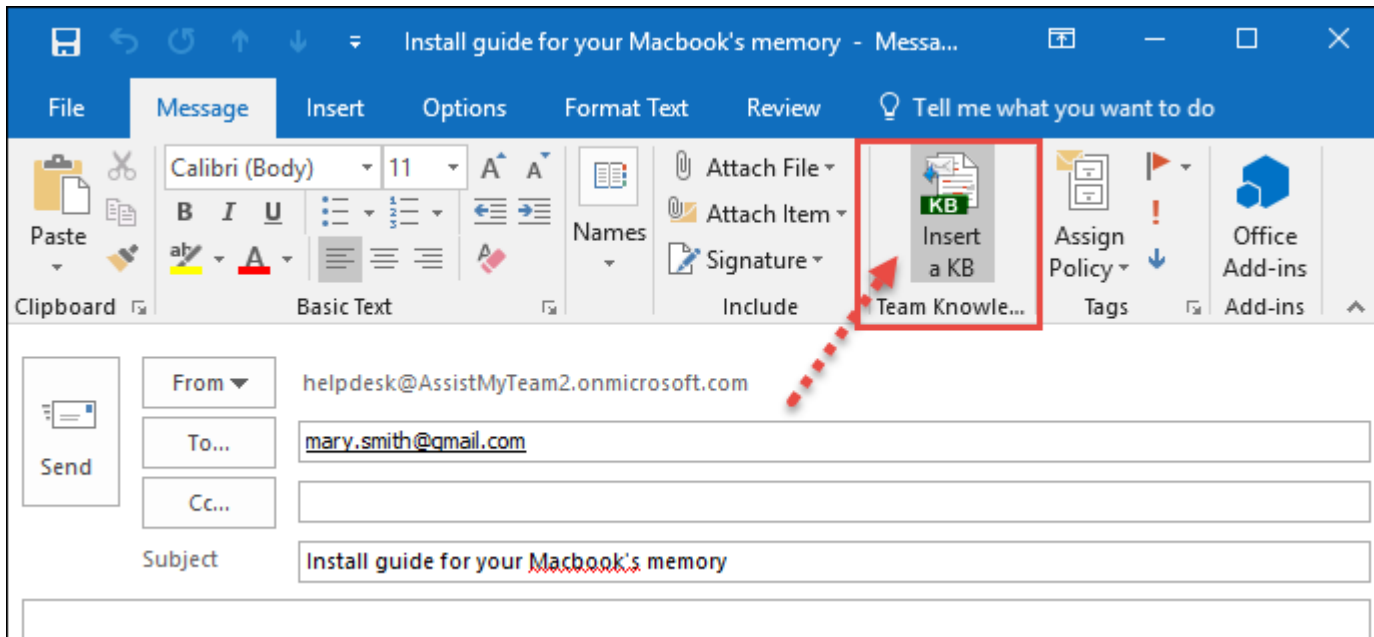
Once KB articles are mined from your archived emails and documents, what you end up is a series of well documented, organized articles that can be easily referenced, searched, catalogued and shared with your support staffs.

The screenshot shows the 'Support KB' web application. The top navigation bar includes 'Home', 'Test', 'Licenses', and 'EDIT LINKS'. The main heading is 'Support KB'. Below it, there is a '+ new item' button and a search bar labeled 'Find an item'. The main content area displays a list of KB articles, categorized by 'Category' and 'ProblemType'. The 'Category : Hardware (4)' section is expanded, showing two items: '3 [125] Mac OS X 10.5: Can receive email, but not send email' and '6 Smooth DVD playing guide \*'. The 'ProblemType : iPod (1)' section is also expanded, showing one item: '8 iPod Charging Issue \*'. Each item has a 'Created By' field with the name 'Bahrur Rahman'.



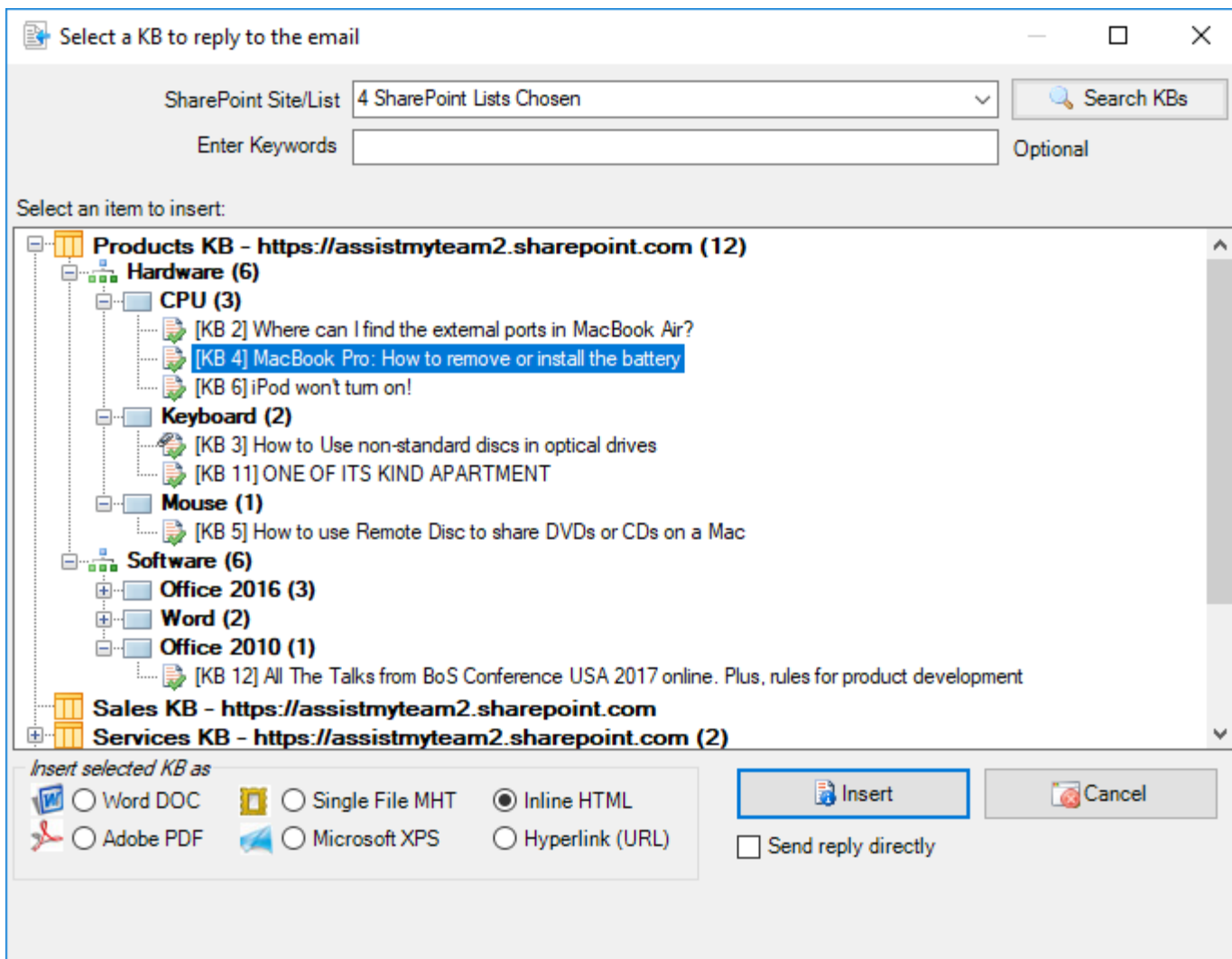
## 7. Inserting a KB Article to a new email when composing

When you are composing a new email in Outlook, you can also insert a KB article directly by clicking the 'Insert a KB' button available in the Personal Knowledgebase toolbar.



This will pop-up a selection box where you can search and choose an appropriate KB article for insertion into the email.

**NOTE:** You can perform keyword search and the matching KB article entries will be highlighted in light-red color.



You have the options to insert the chosen KB article as file attachments in the form of Word Document (.docx), Adobe PDF (.pdf), or as inline content or even as hyperlinked URL. If the KB article has any additional attachments, these too will be copied to the email.



Install guide for your Macbook's memory...

File Message Insert Options Format Text Review Tell me what you want to do

Paste Basic Text Attach File Attach Item Signature Include Team Knowl... Office Add-ins Add-ins

From helpdesk@AssistMyTeam2.onmicrosoft.com

To... mary.smith@gmail.com

Cc...

Subject Install guide for your Macbook's memory

Attached User Install Guide.pdf 657 KB

Dear Mary,

Thank you for contacting us. Please find a possible solution with the KB article (#100013 - MacBook Pro: How to install memory) embedded below:

***I wanted to upgrade my MacBook memory. Can you please guide me through the process?***

**Resolution:**

Your MacBook Pro computer has two memory slots that you access by removing the memory door in the battery bay. Your MacBook Pro comes with at least 512 megabytes (MB) of 667 MHz Double Data Rate (DDR2) Synchronous Dynamic Random-Access Memory (SDRAM) installed. It may have more memory preinstalled, depending on the configuration you chose when you bought the computer.

Notice the actual KB article item below, along its formatting and its attachments. They all make it to the inline content that is embedded into the email (above).

Home	Title	MacBook Pro: How to remove or install the battery
Notebook	ProblemCategory	Hardware
Recent	ProblemType	CPU
boardKB	Solution	<b><i>I wanted to upgrade my MacBook memory. Can you please guide me through the process?</i></b>
SimpleKB		<b>Resolution:</b>
WikiKB		Your MacBook Pro computer has two memory slots that you access by removing the memory door in the battery bay. Your MacBook Pro comes with at least 512 megabytes (MB) of 667 MHz Double Data Rate (DDR2) Synchronous Dynamic Random-Access Memory (SDRAM) installed. It may have more memory preinstalled, depending on the configuration you chose when you bought the computer.
Licensing KB		
Sales KB		
Pages		
Site Contents		
Recycle Bin		
EDIT LINKS	Attachments	User Install Guide.pdf

## 8. Reply a KB Article to an existing email

If your customer writes to you on a recurring issue, for which a KB article was already being published, you can directly hit **'Reply with a KB'** button and choose that particular KB article from the selection box to insert it as file attachments (e.g., PDF attachment) or as inline content in the body of the email reply.

The screenshot shows the Outlook ribbon with the 'Reply with a KB' button highlighted. A red callout bubble points to the button, stating: "Email from a customer seeking support to a frequently asked issue." Below the ribbon, an email is visible with the subject "Got a new battery for MacBook. Help required Urgent". A red arrow points from the 'Reply with a KB' button to the 'Select a KB to reply to the email' dialog box.

The dialog box, titled "Select a KB to reply to the email", contains the following elements:

- SharePoint Site/List:** 3 SharePoint Lists Chosen
- Enter Keywords:** (Empty text box)
- Select an item to insert:** A tree view showing the following structure:
  - Products KB - https://assistmyteam2.sharepoint.com (10)**
    - Hardware (5)**
      - CPU (3)**
        - [KB 2] Where can I find the external ports in MacBook Air?
        - [KB 4] MacBook Pro: How to remove or install the battery
        - [KB 6] iPod won't turn on!
      - Keyboard (1)**
      - Mouse (1)**
    - Software (5)**
      - Office 2016 (3)**
        - [KB 1] How to use Remote Disc to share DVDs or CDs on a Mac
        - [KB 7] Useful keyboard and trackpad tips and shortcuts
        - [KB 9] How to install applications using the MacBook Air SuperDrive
      - Word (2)**
  - Services KB - https://assistmyteam2.sharepoint.com (2)**
  - Support KB - https://assistmyteam2.sharepoint.com (3)**
    - Cars (3)**
      - Audi (1)**
        - [KB 3] [125] Mac OS X 10.5: Can receive email, but not send email
      - BMW (2)**
        - [KB 1] [122] Troubleshooting the MacBook Air SuperDrive
        - [KB 2] [123] MacBook Pro: How to remove or install the battery
- Insert selected KB as:**
  - ☐ Word DOC
  - ☐ Single File MHT
  - ☐ Inline HTML
  - ☒ Adobe PDF
  - ☐ Microsoft XPS
  - ☐ Hyperlink (URL)
- Attachment Naming:**
  - ☒ Article ID
  - ☐ KB subject
  - ☐ Both
- Buttons:** Insert, Cancel
- ☐ Send reply directly

A red callout bubble points to the 'Insert' button, stating: "Choose a KB and click 'Insert' to attach or embed the KB content to a new email reply".

In the selection box (above), KB articles are arranged in a tree, with each SharePoint list representing as the root node, and category and type as child nodes. KB articles are then grouped by their types and categories, making it much easier to find an appropriate one by means of the context of the issue.

You can choose from which SharePoint lists to show the matching KB articles in the selection box.



SharePoint Site/List: 4 SharePoint Lists Chosen

Enter Keywords:

Select an item to insert:

- ☐ KB (https://assistmyteam2.sharepoint.com/licenses)
- ☐ Licensing KB (https://assistmyteam2.sharepoint.com)
- ☐ Procurements KB (https://assistmyteam2.sharepoint.com)
- ☒ Products KB (https://assistmyteam2.sharepoint.com)
- ☒ Sales KB (https://assistmyteam2.sharepoint.com)
- ☒ Services KB (https://assistmyteam2.sharepoint.com)
- ☒ Support KB (https://assistmyteam2.sharepoint.com)

Search KBs

Optional

To further refine the result, you can search by entering a keyword as filter. And KB articles matching that keyword(s) will be highlighted in red color. For instance, if the keyword was 'iPod' as filter, the entries matching 'iPod' are highlighted.

**Products KB - https://assistmyteam2.sharepoint.com (12)**

- Hardware (6)**
  - CPU (3)**
    - [KB 2] Where can I find the external ports in MacBook Air?
    - [KB 4] MacBook Pro: How to remove or install the battery
    - [KB 6] iPod won't turn on!
  - Keyboard (2)**
  - Mouse (1)**
- Software (6)**

**Support KB - https://assistmyteam2.sharepoint.com (4)**

- Colors (2)**
- Hardware (1)**
  - iPod (1)**
    - [KB 8] iPod Charging Issue

You can insert selected KB article in 3 ways to outgoing email:

### 1) Inserting chosen KB article as PDF, XPS file attachment to the email reply

Selected KB article can be applied or inserted into the replied email in varied format. You can choose to insert as attachment in the form of a word document (\*.doc), Adobe PDF (\*.pdf), Microsoft XPS (\*.xps) or as single file MHTML (\*.mht).

File Message Insert Options Format Text Review Tell me what you want to do

Clipboard Basic Text Include Team Knowl... Add-ins

From: helpdesk@AssistMyTeam2.onmicrosoft.com

To: Lisa.Ray@uni.melbourne.edu.au

Subject: RE: iPod Charging Issue

Attached: KB#100010 iPod Charging Issue.pdf 279 KB

Dear Lisa Ray,  
Thank you for contacting us. Attached is a PDF file containing a KB article (#100010 - iPod Charging Issue) with a possible resolution to the issue you were experiencing.

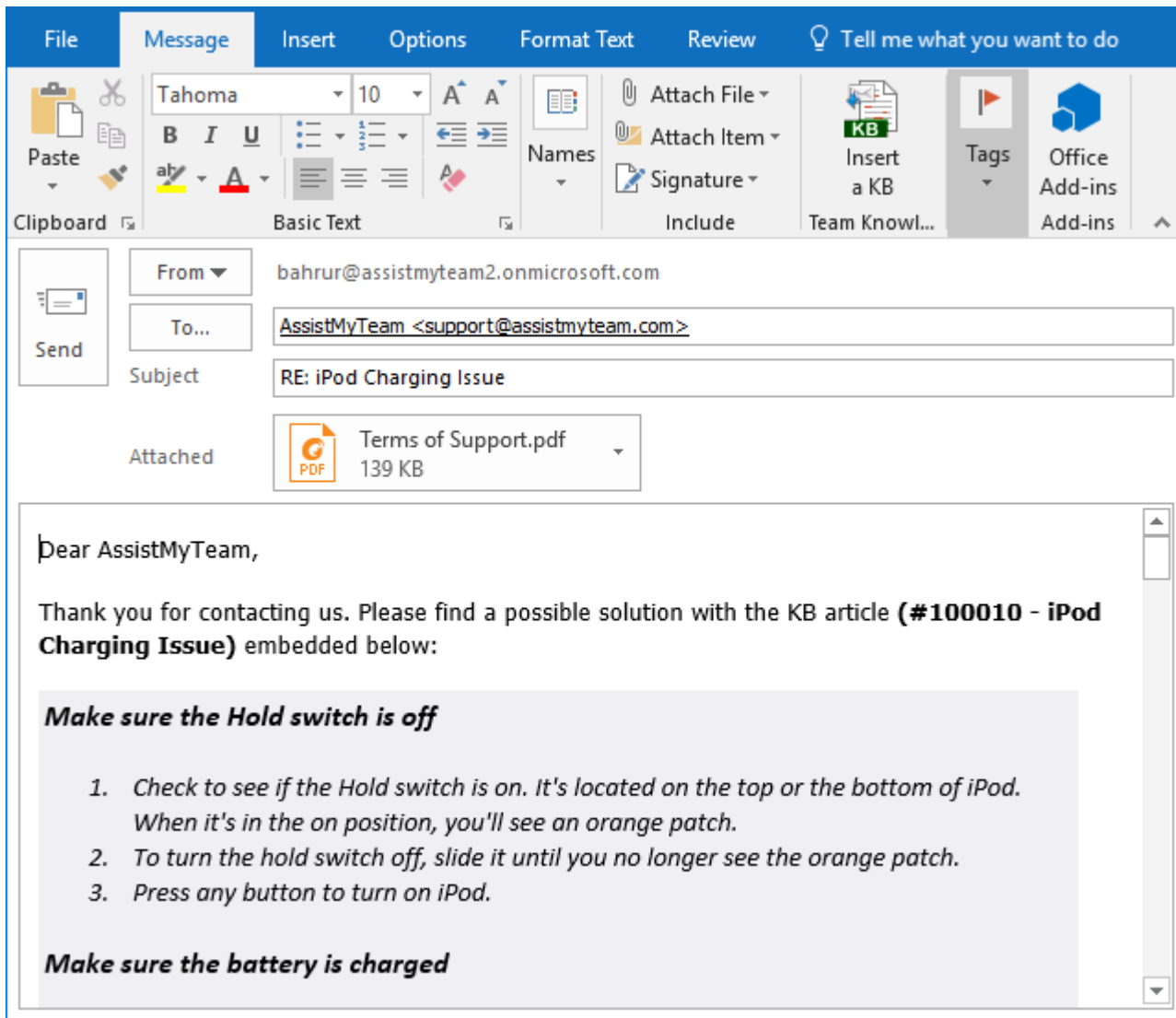
Best Regards,  
Support Team

From: Lisa Ray <Lisa.Ray@uni.melbourne.edu.au>  
Sent: Monday, November 20, 2017 7:58 PM  
To: AssistMyTeam Support <helpdesk@AssistMyTeam2.onmicrosoft.com>  
Subject: iPod Charging Issue



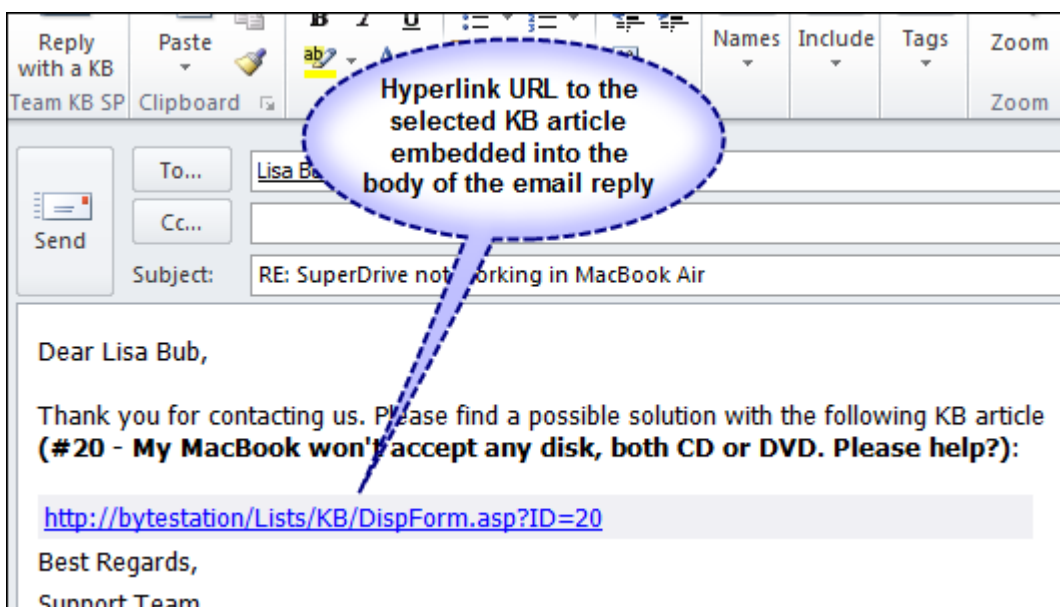
## 2) Inserting chosen KB article as inline content to the email reply

You can also embed the selected KB article directly into the body of the email reply. Any inline images and formatting are preserved in its original state in the reply also.



## 3. Inserting chosen KB article as hyperlink URL into the email reply

Alternatively, if your SharePoint site is opened (i.e., accessible via the web), then you can also insert the hyperlink or URL of the selected KB article into the reply, so that the recipient can simply click the hyperlink to open the relevant article in their web browser.







Optionally, you can choose if to send the reply containing the inserted KB article directly to the recipient or display the inspector compose window, so that you can add further information such as attachments or tweak the content.

*Insert selected KB as*

☒ Word DOC
 ☐ Single File MHT
 ☒ Inline HTML

☐ Adobe PDF
 ☐ Microsoft XPS
 ☐ MSG file

☒ Send reply directly *Note that no compose inspector will be displayed!*

Insert Cancel

Lastly, you can customize the reply template headers that are used in the email reply from **Outlook > Personal KB toolbar > My Options > Reply Templates**.

Select a template to customize  
Reply Email with a KB as file attachment

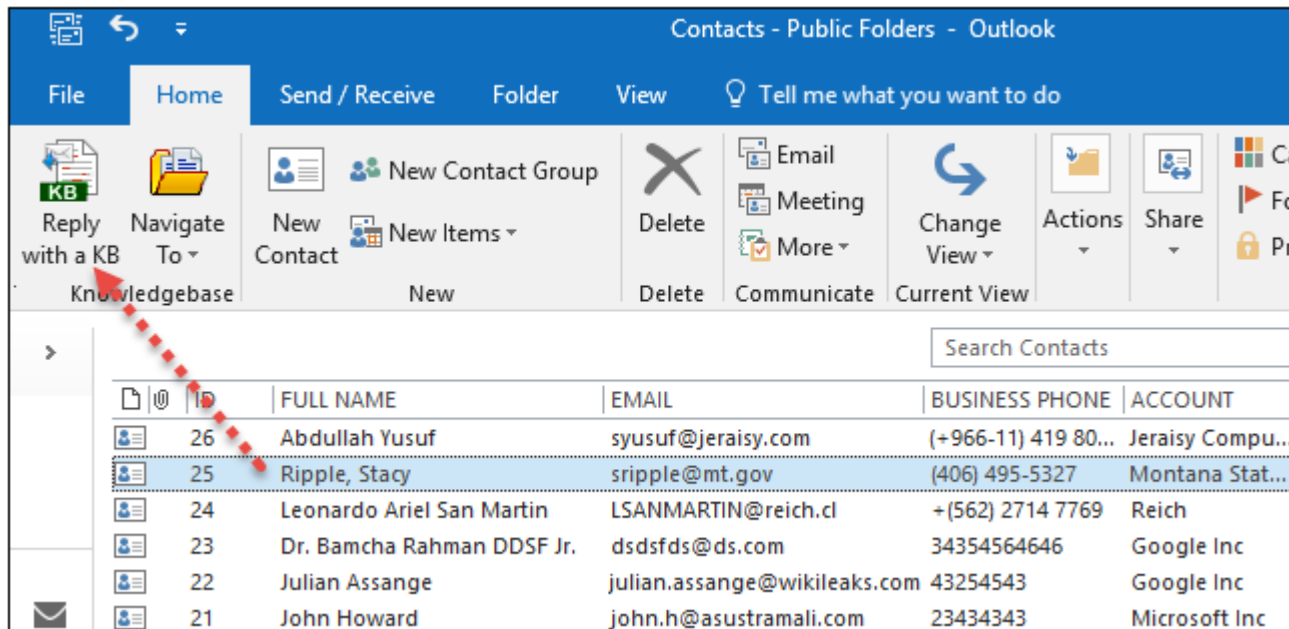
Available Variables (Press 'Ctrl + C' to copy)

Placeholder Variables
KB_ID
KB_SENDER_NAME
KB_SENDER_EMAIL
KB_SUBJECT
KB_EMAIL SUBJECT

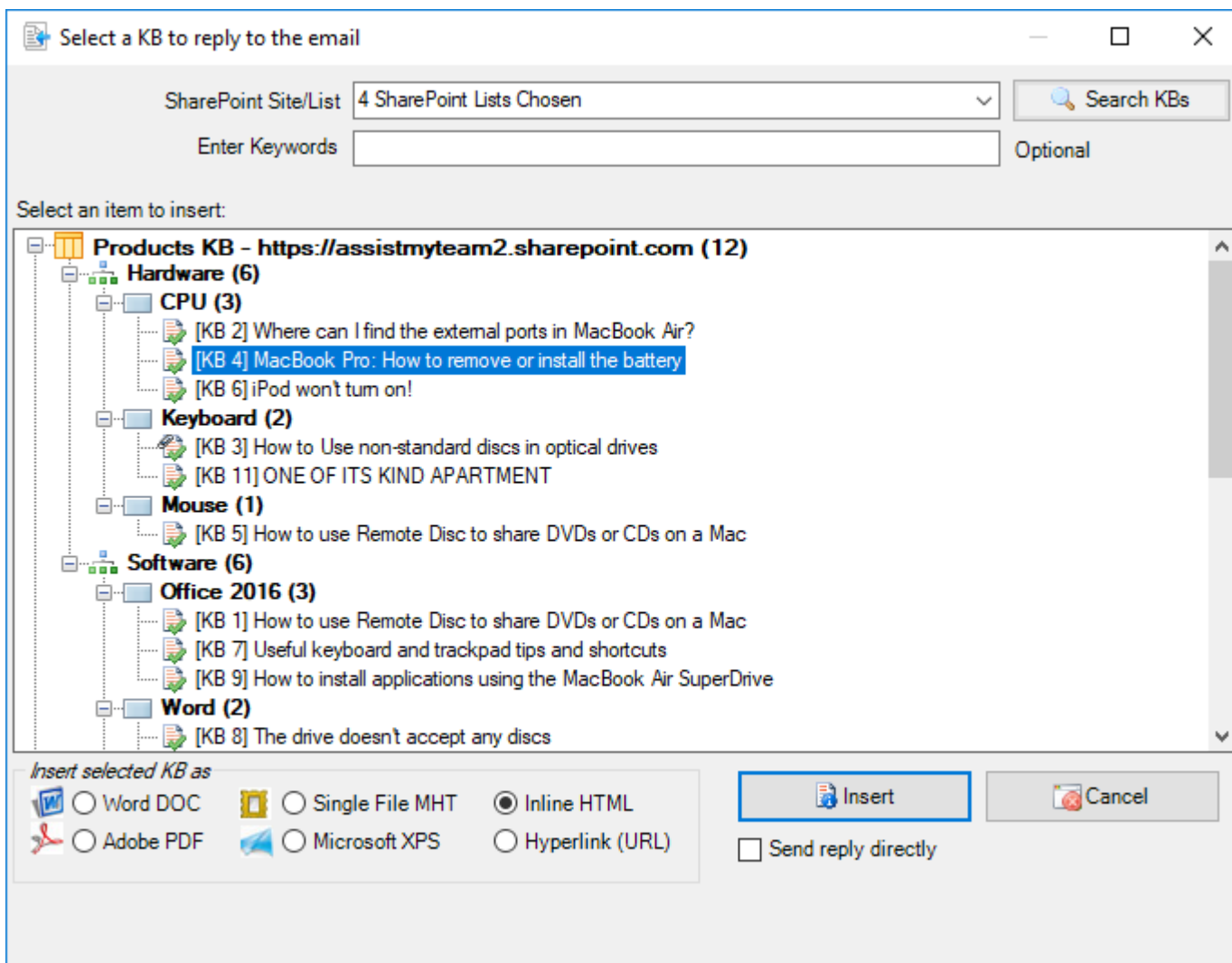
Dear KB\_SENDER\_NAME,  
  
 Thank you for contacting us. Attached is a PDF file containing a KB article (#KB\_ID - KB\_SUBJECT) with a possible resolution to the issue you were experiencing.  
  
 Best Regards,  
 Support Team

## 9. Send a KB Article to an Outlook contact

To send a KB article to an Outlook contact (address book), click **'Reply with a KB'** button on the Personal Knowledgebase toolbar in Outlook, and from the selection box, choose the appropriate KB article to send an email with the chosen KB article.



From the selection box, choose the appropriate KB article to send an email with the chosen KB article.



And when you visually confirm your choice, click **'Insert'**. And this will create a new email having the same subject as that of the chosen KB article and the email content/body will use the **'Reply Template'** where the placeholder variables are substituted with information from the chosen KB article.

File Message Insert Options Format Text Review Tell me what you want to do

Paste Arial 10 B I U Attach File Attach Item Signature Insert a KB Assign Policy Office Add-ins

Clipboard Basic Text Include Team K... Tags Add-ins

Send From helpdesk@AssistMyTeam2.onmicrosoft.com To sripple@mt.gov Subject MacBook Pro: How to install memory Attached User Install Guide.pdf 657 KB

Dear Stacy Ripple,

Thank you for contacting us. Please find a possible solution with the KB article (#100013 - MacBook Pro: How to install memory) embedded below:

***I wanted to upgrade my MacBook memory. Can you please guide me through the process?***

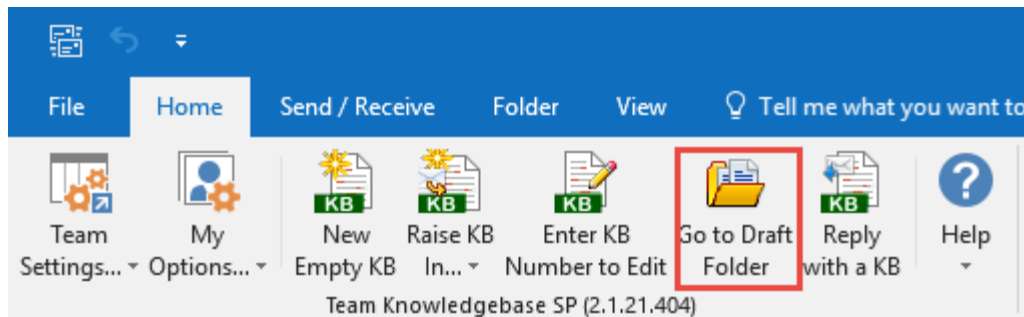
**Resolution:**

Your MacBook Pro computer has two memory slots that you access by removing the memory door in the battery bay. Your MacBook Pro comes with at least 512 megabytes (MB) of 667 MHz Double Data Rate (DDR2) Synchronous Dynamic Random Access Memory (SDRAM) installed.

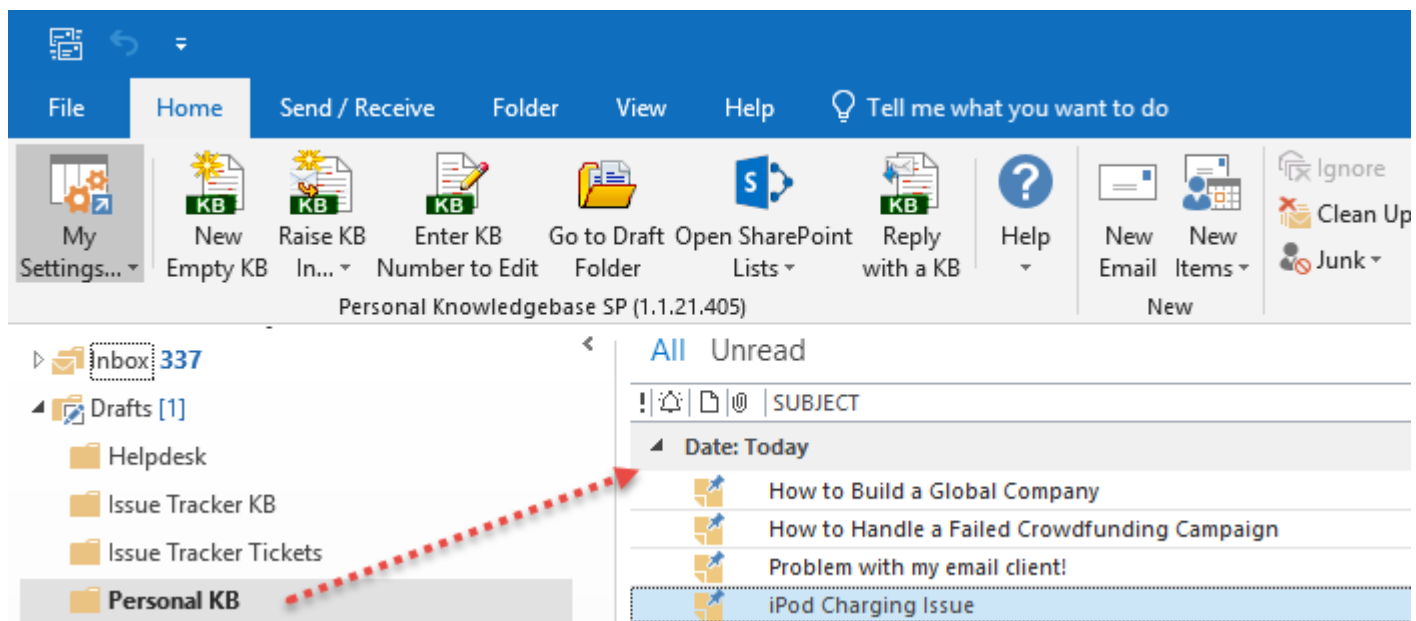
If there are any attachments in the chosen KB article, they too will be copied/attached to the outgoing email.

## 10. Navigate to the Draft KB Folder

You can compose new KB articles from the comfort of your Outlook and if these articles are work in progress, you can choose to save them in your draft folder for later use and editing. By clicking '**Go to Draft folder**' from the Personal KB toolbar in Outlook, you can navigate quickly to your draft KB folder from your Outlook in a single click, without searching for it in the hierarchies of folders.



This draft folder '**Personal KB**' resides as a subfolder under the main Outlook 'Drafts' folder of your primary mailbox. Any KB articles which you had saved as draft will appear here. To edit or publish one, open it and using the KB form, you can further make changes to the KB article and when it is finished, you can publish it finally to the chosen SharePoint list.





## 11. Open KB SharePoint lists in web browser

You have chosen and configured few or many KB SharePoint Lists where KB articles are stored. And if these SharePoint lists are configured with adequate permission levels to view the contents (at the very least), you can navigate quickly to any of these chosen KB SharePoint list in web browser from your Outlook in a single click, without typing in the URL in your web browser and clicking hierarchies of subsites.

The first screenshot shows the Outlook ribbon with the 'Open SharePoint Lists' button highlighted. The dropdown menu lists three KBs: Sales KB, Services KB, and Support KB, all pointing to the URL https://assistmyteam2.sharepoint.com.

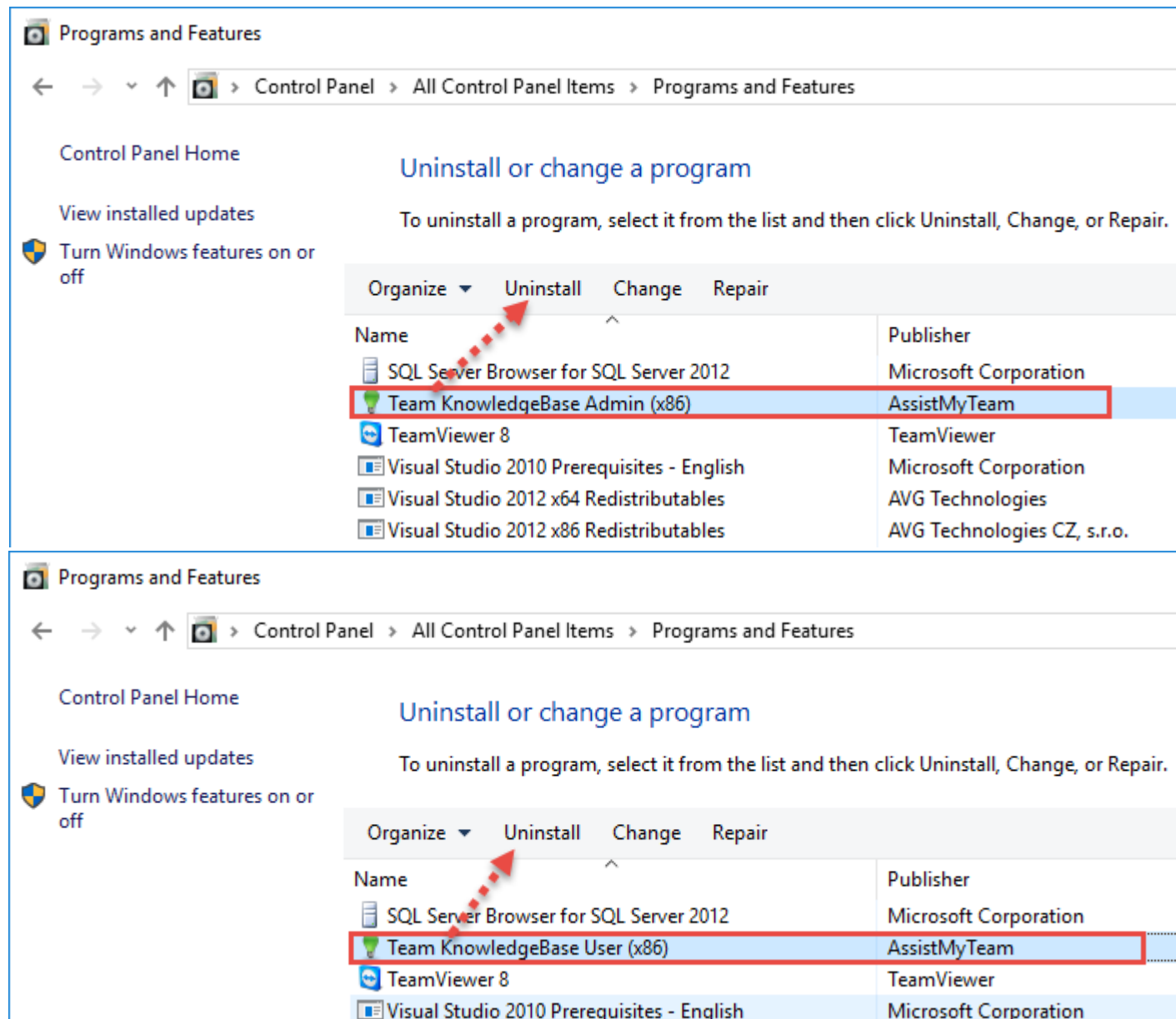
The second screenshot shows the SharePoint 'Support KB' list view. The left sidebar lists various KB categories, with 'Support KB' selected. The main content area displays a list of KB items categorized by 'Category' and 'ProblemType'.

ID	Title	Created By
<b>Category : Cars (3)</b>		
<b>Category : Colors (4)</b>		
<b>ProblemType : Blue (4)</b>		
4	How to Handle a Failed Crowdfunding Campaign *	Bahrur Rahman
5	How to Handle a Failed Crowdfunding Campaign *	Bahrur Rahman
6	New Download: Email to PDF for Outlook *	Bahrur Rahman
7	New Download: Issue Tracker for Outlook & SharePoint (Team Edition) *	Bahrur Rahman
<b>Category : Hardware (1)</b>		
<b>ProblemType : iPod (1)</b>		
8	iPod Charging Issue *	Bahrur Rahman

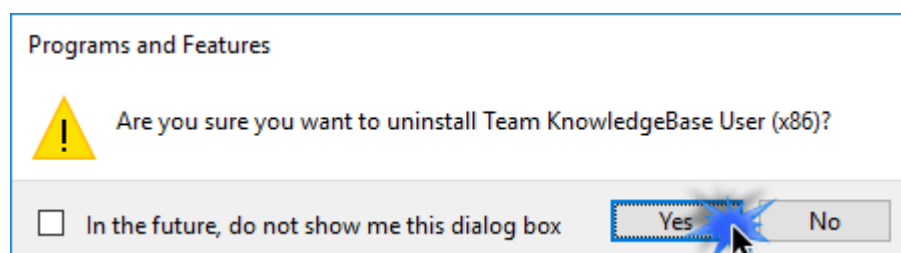
## 12. Uninstalling Personal Knowledgebase add-in

To uninstall the Personal Knowledgebase Add-in tool from your computer, follow the steps outlined below:

**Step 1:** Go to 'Control Panel > Programs and Features'. Scroll down to select 'Personal Knowledgebase' (x86 or x64) and click 'Uninstall' as illustrated below:



**Step 2:** A dialog confirmation follows asking for confirmation. Click **Yes**.



**Step 3:** The Personal Knowledgebase setup will now start the un-installation process. Make sure that Microsoft Outlook is not running (even under the task manager).



### 13. Important links

[Personal Knowledgebase for Outlook and SharePoint - Homepage](#)

Go to the official website of Personal Knowledgebase for Outlook and SharePoint.

[Video Tutorial clips](#)

Watch video tutorials that teach you how to install, configure and work with Personal Knowledgebase.

[Purchase License](#)

Purchase a personal license for Personal Knowledgebase for Outlook and SharePoint.

[Support Maintenance contract](#)

At AssistMyTeam, we're committed to give you the best support for all the products that we offer and more! The AssistMyteam Support Contract helps you use our products more efficiently and work out any issues that you encounter during the course of their use.

[Submit an online support ticket](#)

Use this web form to create a ticket with AssistMyTeam Technical Support.